PEOPLECLICK USER GUIDE

HR SERVICE TEAM

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ACCESSING PEOPLECLICK

The Peopleclick Recruiting Portal is the University of Calgary's recruitment management system. This system enables us to manage our postings, applicants and approval processes. Peopleclick is a web-based application. While you do not need to install any Peopleclick software on your computer to use the Recruiting Portal, you do need to install an approved version of the **Microsoft Internet Explorer** browser (version 7 or 8) and configure it correctly in order to use all of the functions of the Recruiting Portal.

TIPS FOR USERS OF NON-INTERNET EXPLORER BROWSERS

- If you are a PC user and have selected a different browser as your default (e.g., Firefox), you can access Peopleclick by opening Internet Explorer from your desktop and going to https://home.peopleclick.com. If Internet Explorer 7 or 8 is not installed on your PC, you can download it from http://microsoft.com.

- MAC users have the option of accessing the **U of C Virtual Desktop** which will allow you to use Internet Explorer on your computer. For instructions, please visit the HR website.
  Note: You must be on campus to access the Virtual Desktop

- If you are a Linux or Sun Microsystems user, there are alternatives:

  a. Contact the Recruitment Team (hrhire@ucalgary.ca) and request that applications be emailed to you directly
  b. Contact the Recruitment Team (hrhire@ucalgary.ca) and request to have a colleague/administrator added as a hiring manager in Peopleclick so that they can access applications and action candidates on your behalf
  c. There are often labs and /or PCs available for use by students/staff. Inquire in your department/unit as to where you may be able to access a PC

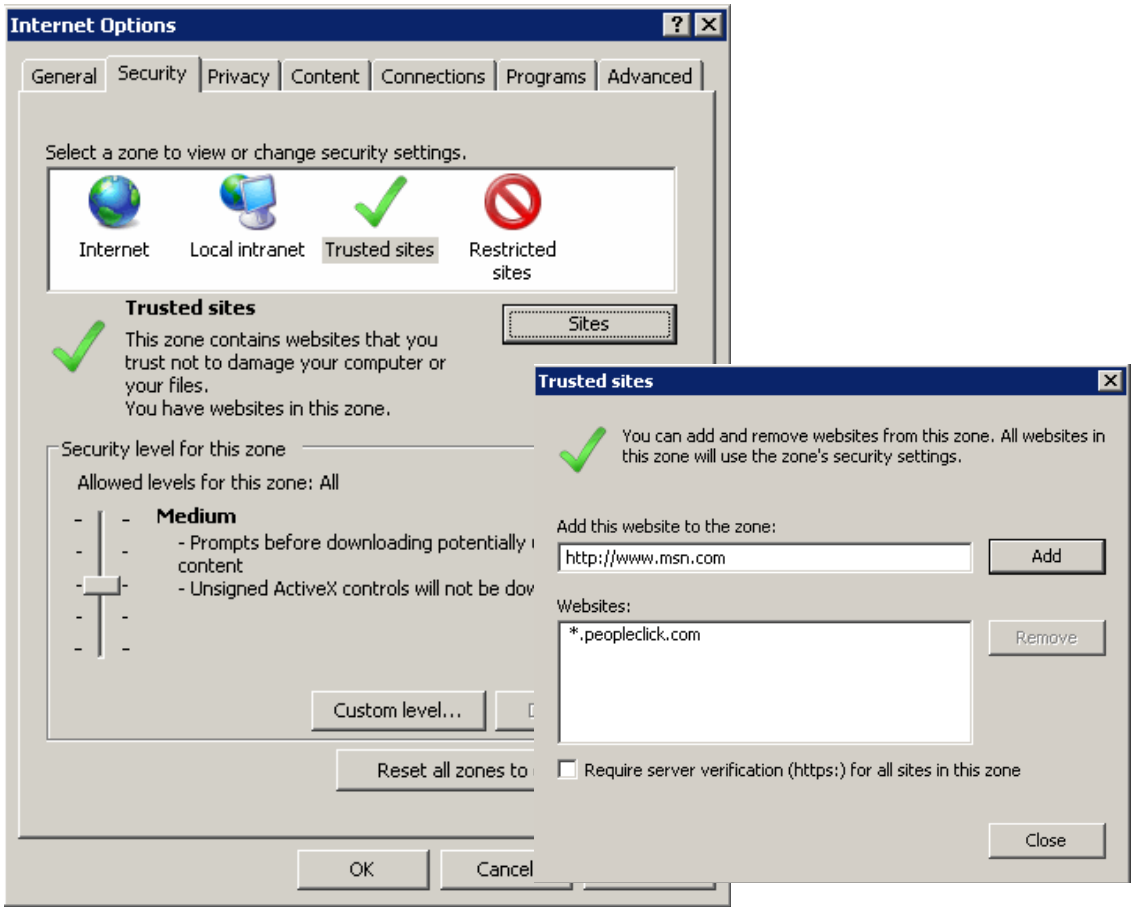
CONFIGURE INTERNET EXPLORER

When you have successfully downloaded Internet Explorer (if necessary), you must configure certain settings to ensure proper functions are available.

1. Open Internet Explorer

2. On the **Tools** menu, select **Internet Options**

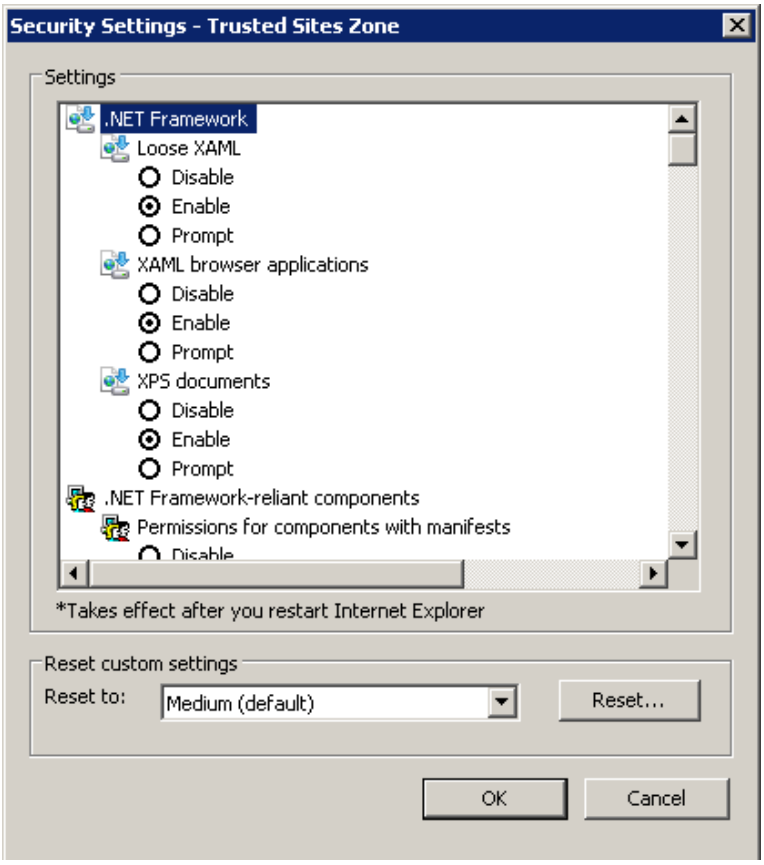
SET TRUSTED SITES:



3. Click the **Security** tab at the top of the Internet Options dialog box
4. Click the **Trusted Sites** icon
5. Click the **Sites** button
6. Unselect the **Require server verification (https:) for all sites in this zone** check box
7. Type ***.peopleclick.com** in the **Add this Web site to the zone** field and click the **Add** button
8. Click **Close** to return to the Security tab

CONFIGURE INTERNET EXPLORER (CONTINUED)

SET SECURITY SETTINGS:

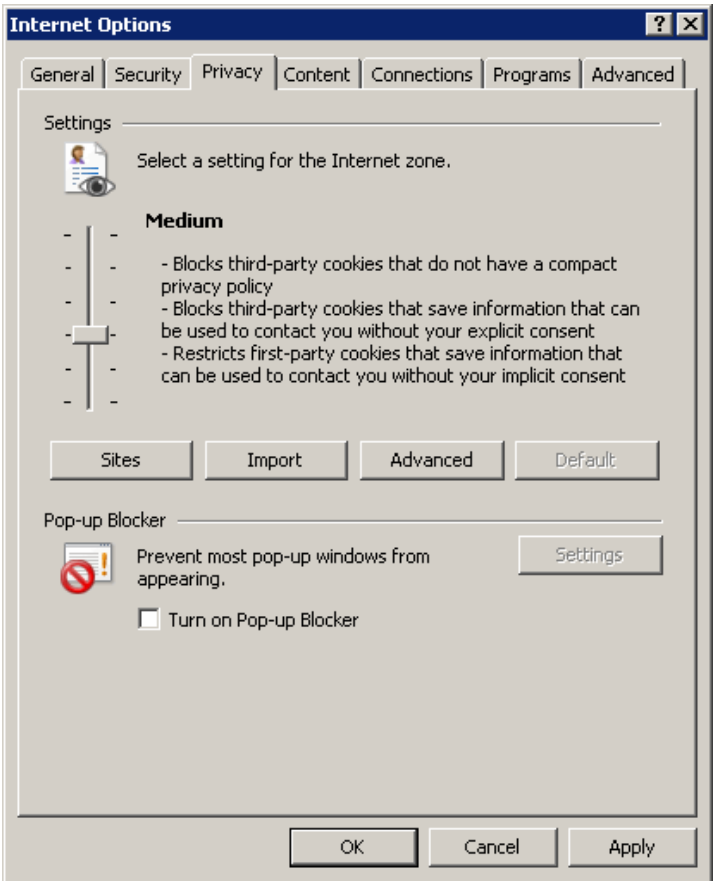


1. On the Security tab, click the **Custom Level** button
2. Use the information in the table below to set the Security Settings that impact the Peopleclick RMS Recruiting Portal
3. Click **OK** to apply and save your changes

Setting Name	Required Value
Active X controls and plug-ins	
Run signed ActiveX controls	Enable
Script ActiveX controls marked safe for scripting	Enable
Downloads	
File Download	Enable (Required to view candidate and requisition attachments that are not viewed natively within the browser window.)
Miscellaneous	
Submit non-encrypted form data	Enable. (Required to support the Candidate Portal if not using HTTPS.)
Scripting	
Active Scripting	Enable. (Required to support the Candidate Portal and Business Intelligence Platform.)

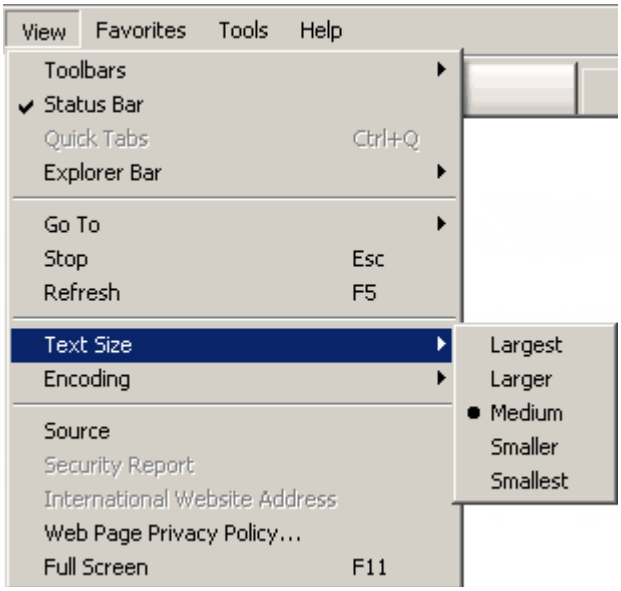
CONFIGURE INTERNET EXPLORER (CONTINUED)

SET PRIVACY SETTINGS:



1. Click the **Privacy** tab
2. Use the slider to set the privacy setting to **Medium**
3. Click **OK**.

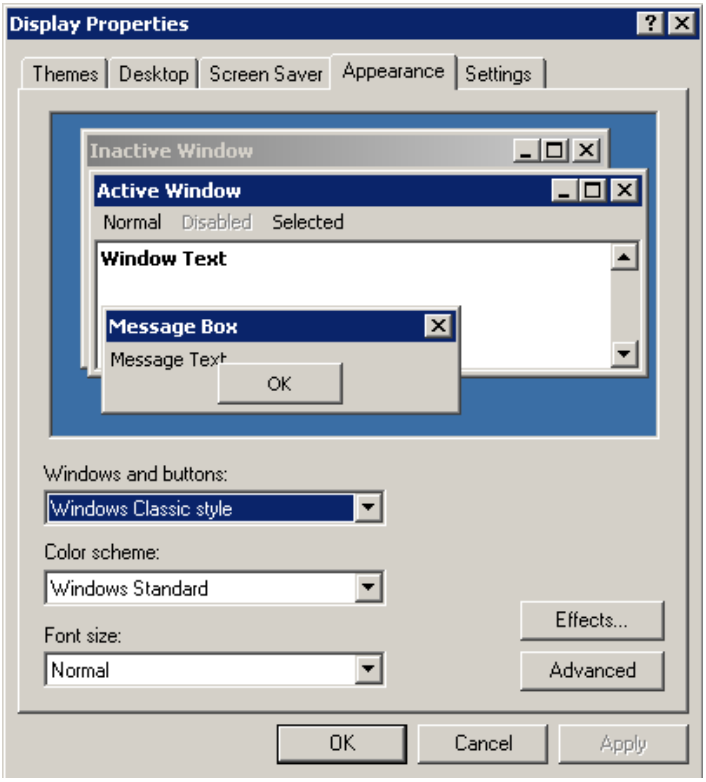
SET TEXT SIZE:



1. On the **View** menu, click **Text Size**
2. Select **Medium**, **Smaller**, or **Smallest**

CONFIGURE DESKTOP SETTINGS

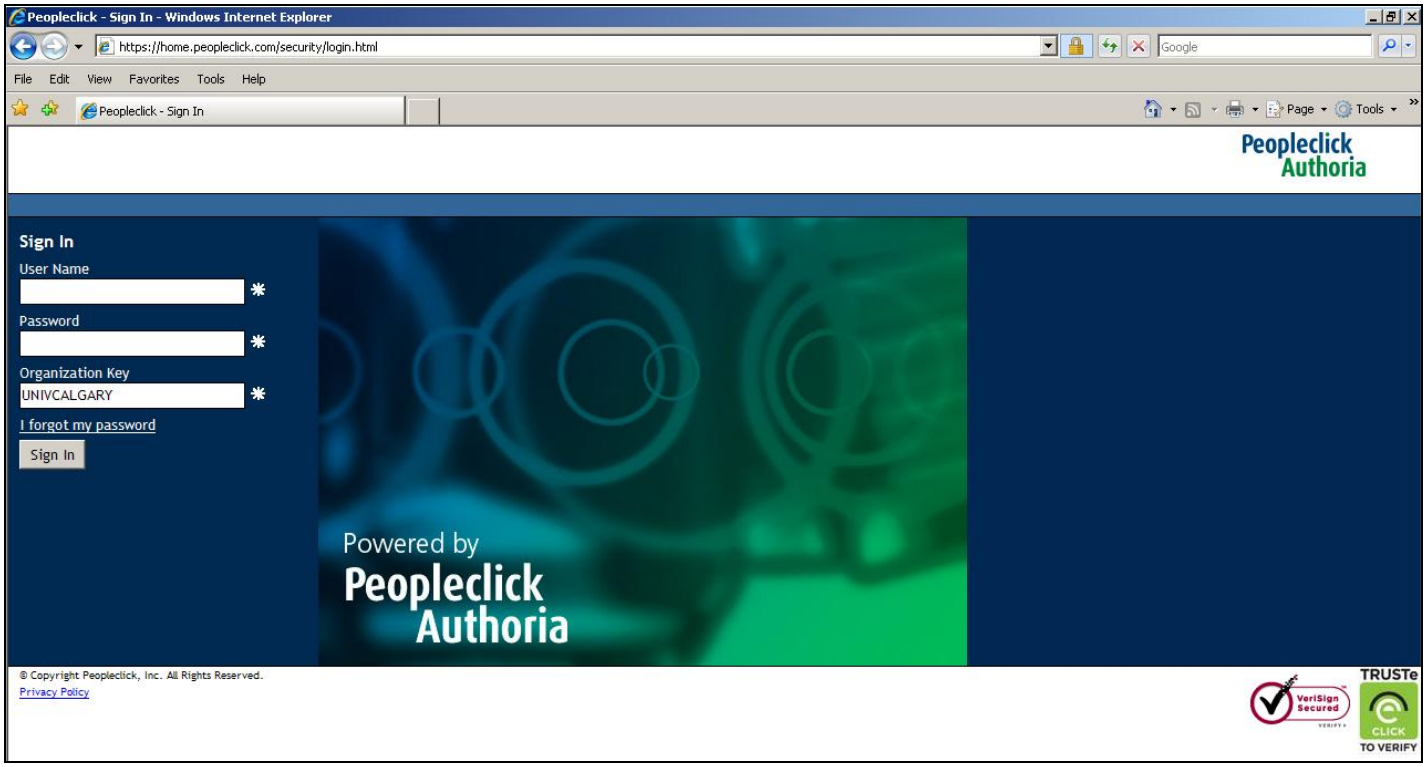
The Peopleclick RMS Recruiting Portal is best viewed when specific display settings are selected:



1. Right-click in your Windows Desktop
2. Select **Properties** from the pop-up menu
3. Click the **Appearance** tab
4. Select **Normal** in the **Font size** field
5. Click the **Settings** tab
6. Move the slider to set the display size to 1024 X 768
7. Click the **Advanced** button
8. On the **General** tab, select **Normal (96 DPI)** in the DPI Setting field and then click **OK**
9. Click **OK**.

BASIC PEOPLECLICK FUNCTIONS

SIGN IN TO PEOPLECLICK



STEPS

In Internet Explorer (version 7 or 8), enter the URL:
https://home.peopleclick.com/

Enter your username, password and organization key (**UNIVCALGARY**).

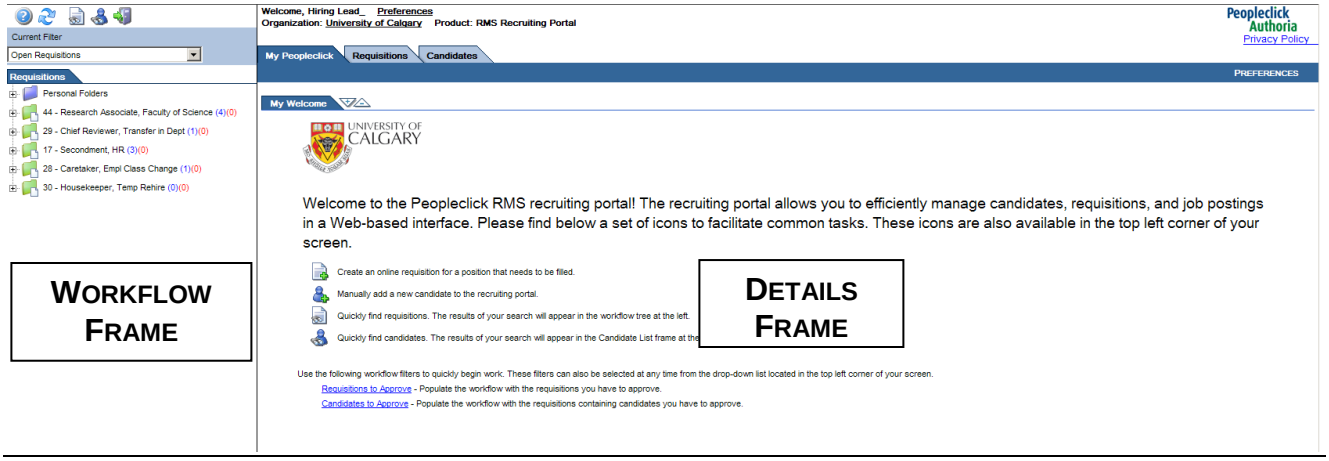
Your username and password will be provided to you by the Recruitment Team.

If you are having problems logging in, please contact hrhire@ucalgary.ca.

NAVIGATING THE RECRUITING PORTAL

IDENTIFY SCREEN ELEMENTS IN THE RECRUITING PORTAL

Peopleclick has been designed to make your work easier and more efficient. The Recruiting Portal window is divided into two primary frames: the **Workflow** frame, located on the left, and the **Details** frame, located on the right.


Welcome, Hiring Lead_ Preferences
Organization: University of Calgary Product: RMS Recruiting Portal
Peopleclick Authoria
Privacy Policy
Current Filter
Open Requisitions
Requisitions
Personal Folders
44 - Research Associate, Faculty of Science (4)(0)
29 - Chief Reviewer, Transfer in Dept (1)(0)
17 - Secondment, HR (3)(0)
28 - Caretaker, Empl Class Change (1)(0)
30 - Housekeeper, Temp Rehire (0)(0)
My Peopleclick
Requisitions
Candidates
PREFERENCES
My Welcome
UNIVERSITY OF CALGARY
Welcome to the Peopleclick RMS recruiting portal! The recruiting portal allows you to efficiently manage candidates, requisitions, and job postings in a Web-based interface. Please find below a set of icons to facilitate common tasks. These icons are also available in the top left corner of your screen.
Create an online requisition for a position that needs to be filled.
Manually add a new candidate to the recruiting portal.
Quickly find requisitions. The results of your search will appear in the workflow tree at the left.
Quickly find candidates. The results of your search will appear in the Candidate List frame at the
Use the following workflow filters to quickly begin work. These filters can also be selected at any time from the drop-down list located in the top left corner of your screen.
Requisitions to Approve - Populate the workflow with the requisitions you have to approve.
Candidates to Approve - Populate the workflow with the requisitions containing candidates you have to approve.
WORKFLOW FRAME
DETAILS FRAME

Workflow Frame

The Workflow frame displays your existing requisitions (jobs) in a folder format. These **requisition** folders contain detailed information about each requisition. Within each requisition folder, a series of **workflow** folders help move candidates through the hiring process.

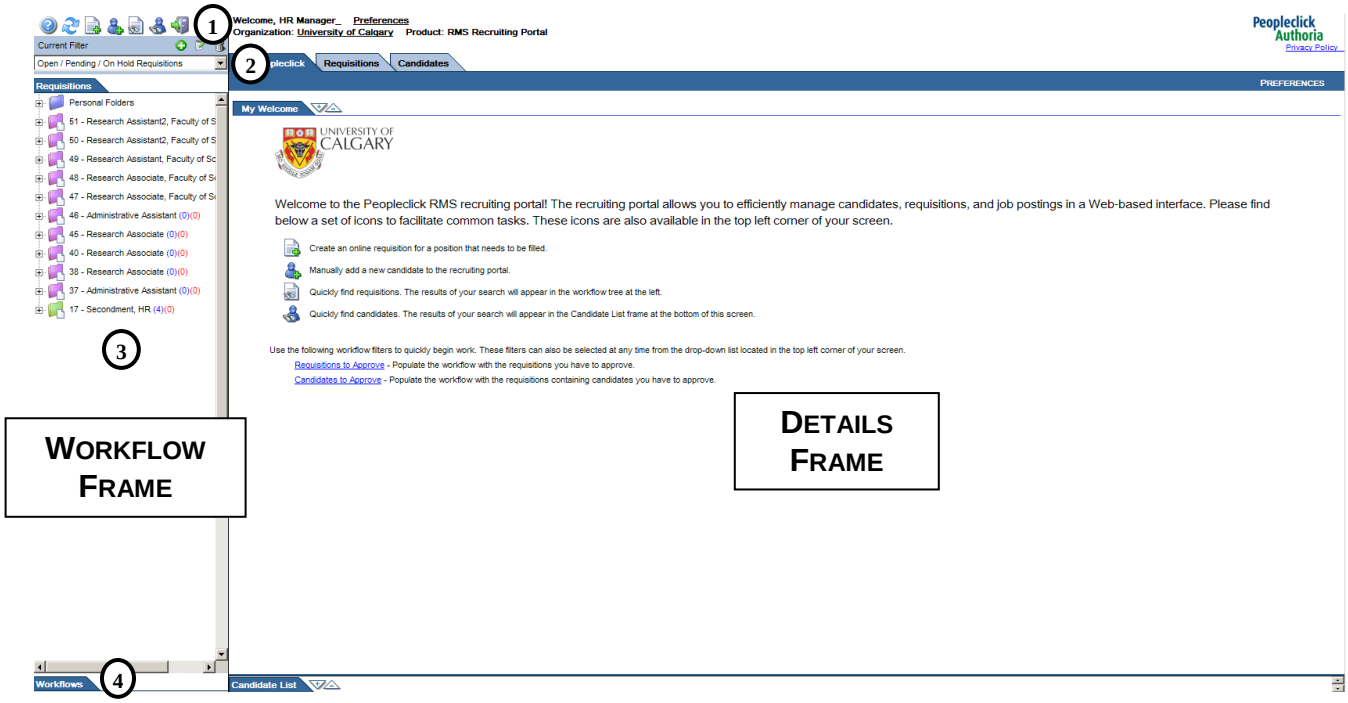
Candidates appear in the Sent to Manager folder and can be moved through the workflow folders as they are evaluated and a hiring decision is made.

Details Frame

The Details frame displays the information needed to create requisitions and maintain detailed information about requisitions and candidates.

The Details frame displays three main tabs at the top of the frame. Page labels are located directly beneath the main tabs, and information panels are displayed within these pages. Use the tabs, pages, and panels of the Details frame to complete your day-to-day recruiting functions.

Recruiting Portal Screen Elements


1
2
3
4
Welcome, HR Manager_ Preferences
Organization: University of Calgary Product: RMS Recruiting Portal
Peopleclick Authoria
Privacy Policy
Requisitions
Candidates
PREFERENCES
My Welcome
UNIVERSITY OF CALGARY
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Manually add a new candidate to the recruiting portal.
Quickly find requisitions. The results of your search will appear in the workflow tree at the left.
Quickly find candidates. The results of your search will appear in the Candidate List frame at the bottom of this screen.
Use the following workflow filters to quickly begin work. These filters can also be selected at any time from the drop-down list located in the top left corner of your screen.
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Candidates to Approve - Populate the workflow with the requisitions containing candidates you have to approve.
Current Filter
Open / Pending / On Hold Requisitions
Personal Folders
17 - Secondment, HR (4)(0)
Workflows
Candidate List
WORKFLOW FRAME
DETAILS FRAME

Workflow Frame. The left side of the window displays requisitions (job openings). Each requisition contains a set of folders that represent the hiring process. Candidates are moved from folder to folder as they move through the hiring process.

1. **Global Icons Toolbar.** The Global toolbar is visible regardless of which main tab is selected in the Details Frame.

2. **Requisition Filter.** Requisition filters are used to manage the list of requisitions that is displayed in the Workflow frame. For example, you can use filters to display only requisitions that fall under a specific status (*Open / Pending / On Hold*), or only requisitions that are assigned to a specific hiring manager. You may create, edit, and delete filters.

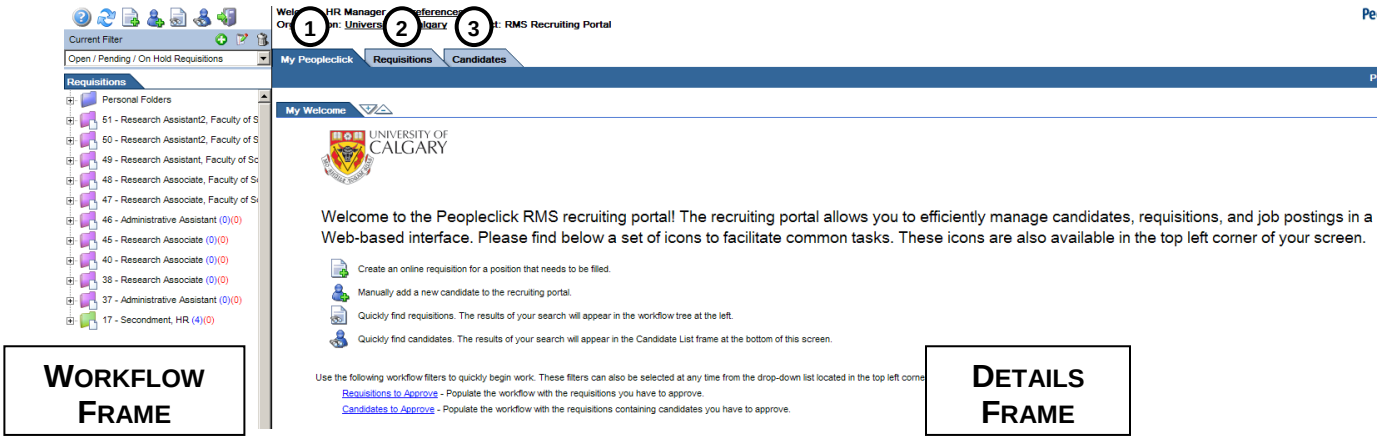
3. **Requisitions View.** The requisitions view displays workflow folders within each requisition. The currently selected requisition filter determines which requisitions are shown. To display the requisitions view, click the **Requisitions** tab in the Workflow frame.

4. **Workflows View.** The workflows view displays all the candidates who are in each workflow folder, regardless of the requisition they are assigned to. For example, if you want to review a complete list of candidates being interviewed, click the **Workflows** tab and then click the Interviews folder. The total number of candidates displayed is determined by the currently selected requisition filter and the number of requisitions you have permission to view.

Recruiting Portal Screen Elements (continued)

Details Frame. The right side of the window displays the Recruiting Portal three main tabs:

1. The **My Peopleclick** tab is used to configure the Recruiting Portal so you can easily access the items you need in your daily job duties, such as viewing requisition, candidate, and job posting summaries.
2. The **Requisitions** tab is used to view information about your current requisitions, create and modify requisitions, and add, view, and delete notes and attachments associated with requisitions. Click on job a title in the Workflow frame to view the requisition in the Details Frame.
3. The **Candidates** tab is used to view and modify information about current candidates, enter new candidates in the system, and add notes and attachments to a candidate's profile. Click on the Candidates name to view the Candidate in the Details Frame.


1
2
3
RMS Recruiting Portal
My Peopleclick
Requisitions
Candidates
Current Filter
Open / Pending / On Hold Requisitions
Requisitions
Personal Folders
My Welcome
UNIVERSITY OF CALGARY
Welcome to the Peopleclick RMS recruiting portal! The recruiting portal allows you to efficiently manage candidates, requisitions, and job postings in a Web-based interface. Please find below a set of icons to facilitate common tasks. These icons are also available in the top left corner of your screen.
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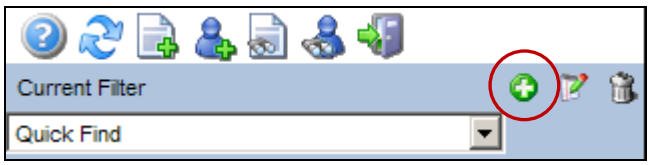
Manually add a new candidate to the recruiting portal.
Quickly find requisitions. The results of your search will appear in the workflow tree at the left.
Quickly find candidates. The results of your search will appear in the Candidate List frame at the bottom of this screen.
Use the following workflow filters to quickly begin work. These filters can also be selected at any time from the drop-down list located in the top left corne
Requisitions to Approve - Populate the workflow with the requisitions you have to approve.
Candidates to Approve - Populate the workflow with the requisitions containing candidates you have to approve.
WORKFLOW FRAME
DETAILS FRAME

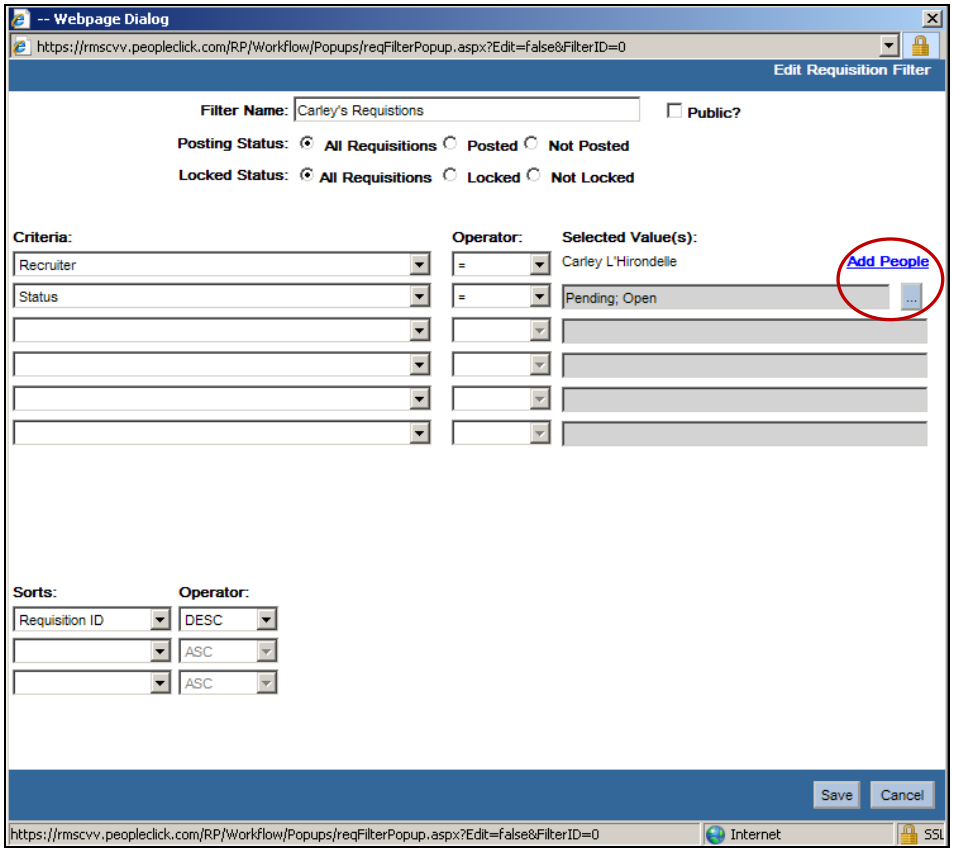
CREATING FILTERS IN PEOPLECLICK

You can create a filter to customize the list of requisitions shown based on your own set of criteria.

Add a Requisition Filter



Click the **Add Requisition Filter** icon ( ) above the Workflow tree.



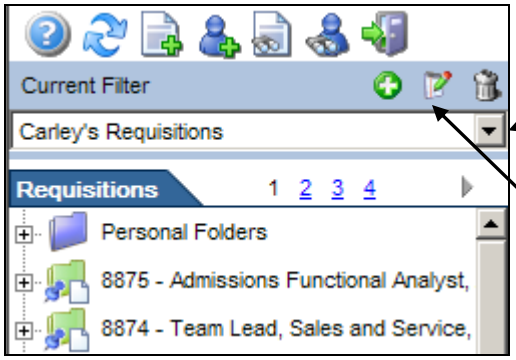
Type the new filter's **Filter Name**

Select **Public?** if you want to share this filter with other Recruiting Portal users. Leave this check box empty if you want to keep the filter private.

Specify the **Posting Status** of the requisitions you want to display - either 'All Requisitions', 'Posted', or 'Not Posted'. **Locked Status** should always be set to 'All Requisitions'.

Select the **Criteria** you want the filter to use to search for requisitions. (for example: Hiring Manager, Requisition Status, Location, etc.)

Click the Lookup ( ) button to select the specific value(s) for that criterion. If the criterion requires you to find people's names as the value, click **Add People**.

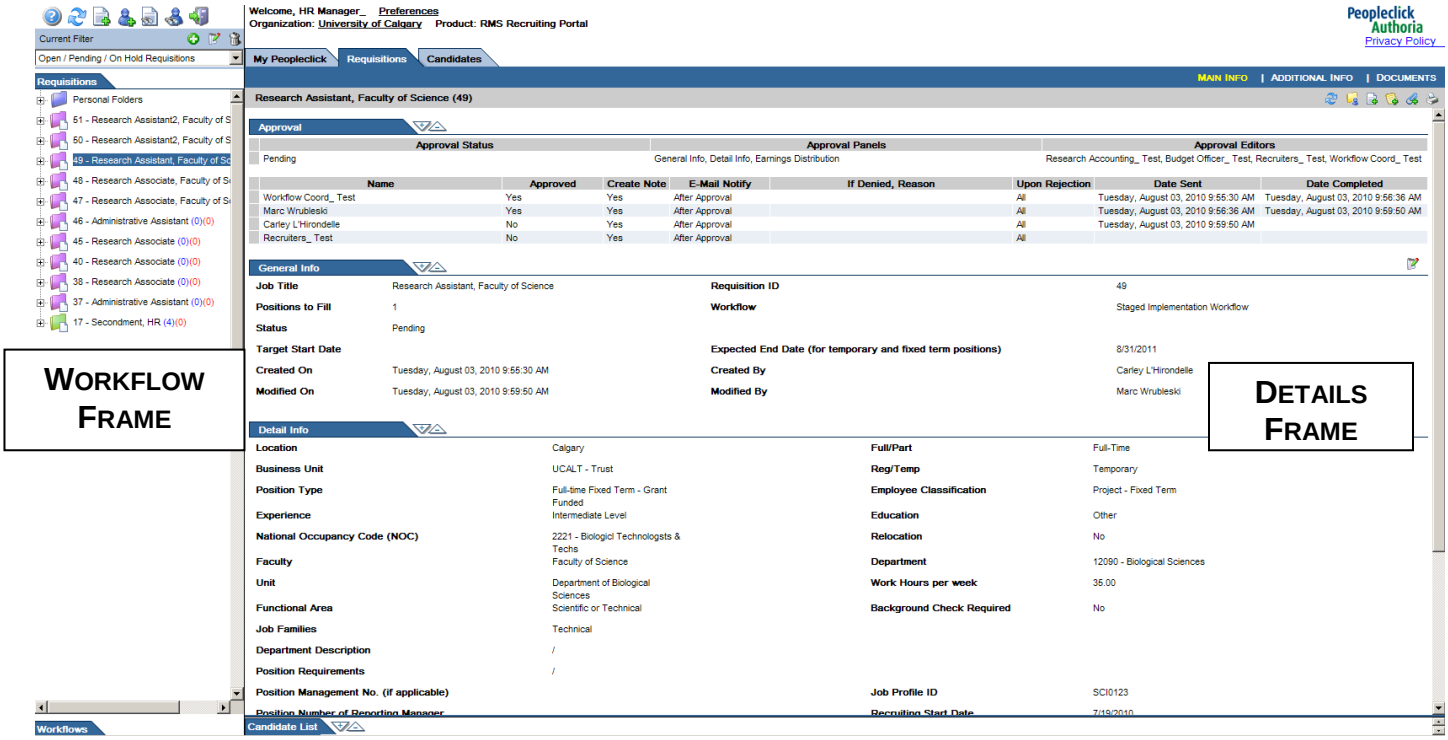


Saved filters can be selected in the **Current Filter** drop-down box. When you select a filter, the requisitions that meet the criteria of the filter will be displayed in your workflow.

To edit a filter, ensure it is selected as the Current Filter and click the edit ( ) icon. The pop-up displayed above will appear and you can update the filter/criteria as required.

VIEW REQUISITION INFORMATION

To view a requisition, simply click on the title of the position in the Workflow frame. The details for that requisition will appear on the right hand side of the screen in the Details frame.



Requisition ID and Title

New requisitions display in **bold** for the first 24 hours. **9010 – Administrative Assistant, Faculty of Medicine (5)(5)**

- The **blue** number designates the total number of candidates in the requisition.
- The **red** number designates the number candidates who are new to the requisition within the last 24 hours.

Requisition Status

Folder colours change when the status of the requisition changes. The status can be changed one of two ways, either automatically by the system or manually by a Recruiter.

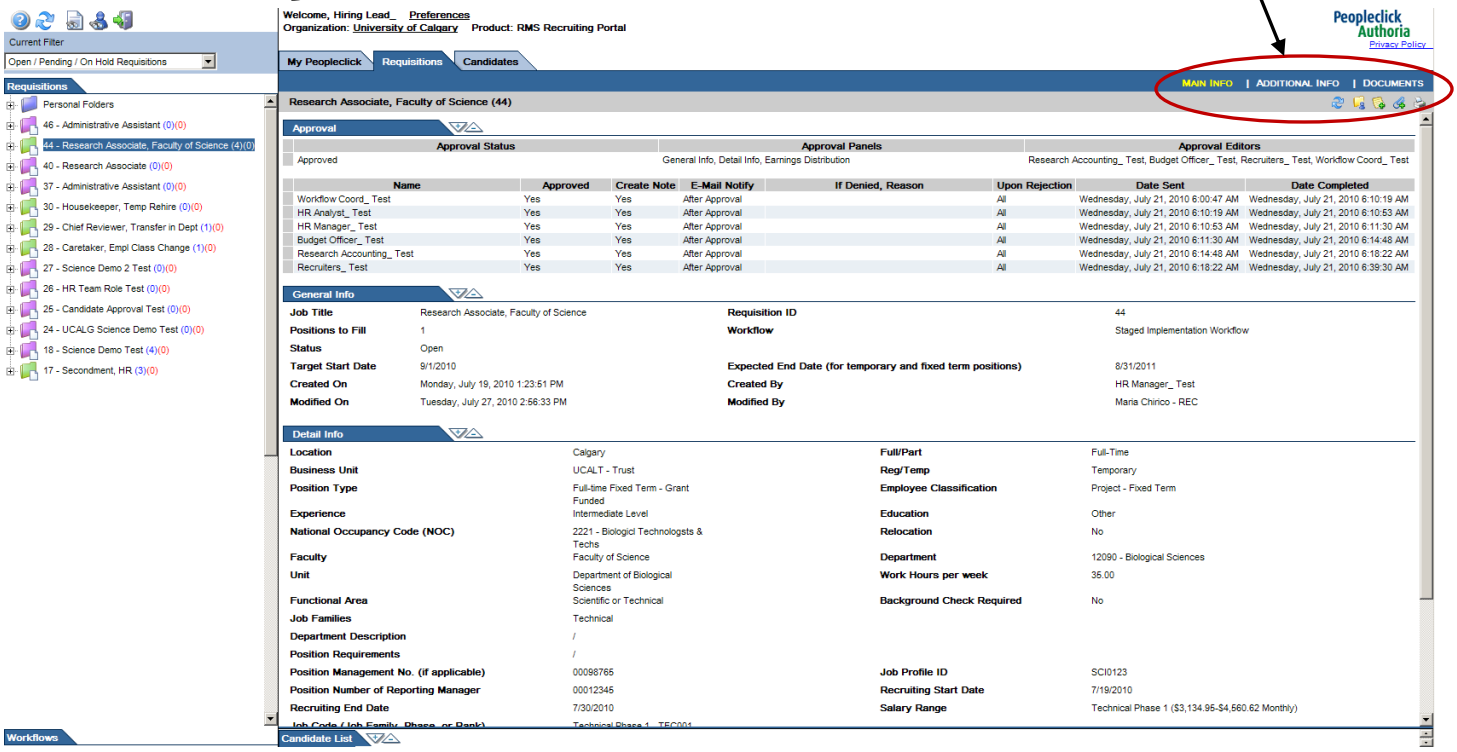
Requisition Status Categories

(green)	**Open**
(green with blue thumb tack)	**Open** and posted on the U of C Careers website
(purple)	**Pending** (awaiting approval)
(yellow)	**Closed**
(blue)	**Filled**
(orange)	**Cancelled**
(red)	**Denied** (rejected / sent back for corrections)

VIEW REQUISITION INFORMATION (CONTINUED)

Requisition information is divided into three separate pages:

- **Main Info**
- **Additional Info**
- **Documents**

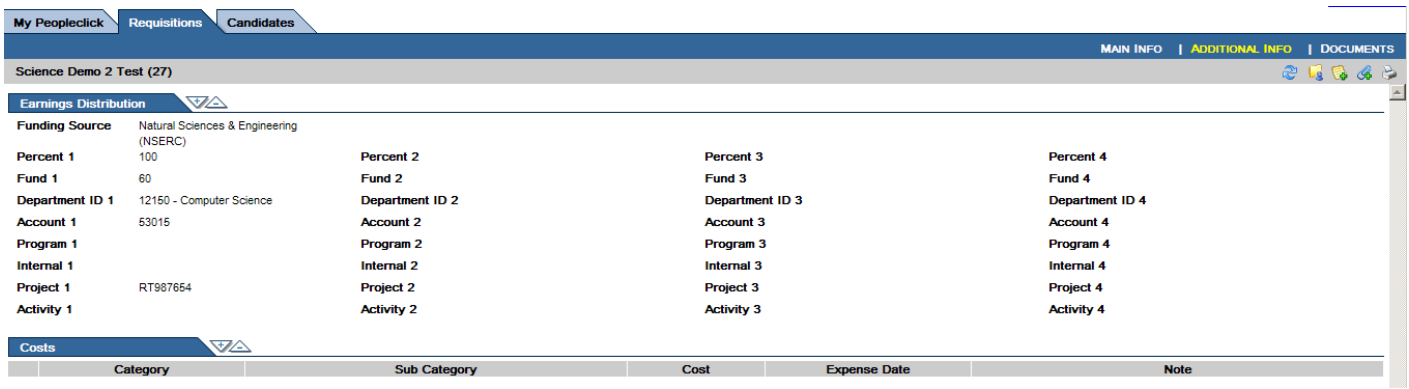

Welcome, Hiring Lead_ Preferences
Organization: University of Calgary Product: RMS Recruiting Portal
Peopleclick Authoria
Privacy Policy
My Peopleclick
Requisitions
Candidates
MAIN INFO | ADDITIONAL INFO | DOCUMENTS
Current Filter
Open / Pending / On Hold Requisitions
Requisitions
Personal Folders
46 - Administrative Assistant (0)(0)
44 - Research Associate, Faculty of Science (4)(0)
40 - Research Associate (0)(0)
37 - Administrative Assistant (0)(0)
30 - Housekeeper, Temp Rehire (0)(0)
29 - Chief Reviewer, Transfer in Dept (1)(0)
28 - Caretaker, Empl Class Change (1)(0)
27 - Science Demo 2 Test (0)(0)
26 - HR Team Role Test (0)(0)
25 - Candidate Approval Test (0)(0)
24 - UCALG Science Demo Test (0)(0)
18 - Science Demo Test (4)(0)
17 - Secondment, HR (3)(0)
Research Associate, Faculty of Science (44)
Approval
Approval Status
Approved
Approval Panels
General Info, Detail Info, Earnings Distribution
Approval Editors
Research Accounting_ Test, Budget Officer_ Test, Recruiters_ Test, Workflow Coord_ Test
Name | Approved | Create Note | E-Mail Notify | If Denied, Reason | Upon Rejection | Date Sent | Date Completed
Workflow Coord_ Test | Yes | Yes | After Approval | | All | Wednesday, July 21, 2010 6:00:47 AM | Wednesday, July 21, 2010 6:10:19 AM
HR Analyst_ Test | Yes | Yes | After Approval | | All | Wednesday, July 21, 2010 6:10:19 AM | Wednesday, July 21, 2010 6:10:53 AM
HR Manager_ Test | Yes | Yes | After Approval | | All | Wednesday, July 21, 2010 6:10:53 AM | Wednesday, July 21, 2010 6:11:30 AM
Budget Officer_ Test | Yes | Yes | After Approval | | All | Wednesday, July 21, 2010 6:11:30 AM | Wednesday, July 21, 2010 6:14:48 AM
Research Accounting_ Test | Yes | Yes | After Approval | | All | Wednesday, July 21, 2010 6:14:48 AM | Wednesday, July 21, 2010 6:18:22 AM
Recruiters_ Test | Yes | Yes | After Approval | | All | Wednesday, July 21, 2010 6:18:22 AM | Wednesday, July 21, 2010 6:39:30 AM
General Info
Job Title: Research Associate, Faculty of Science
Requisition ID: 44
Positions to Fill: 1
Workflow: Staged Implementation Workflow
Status: Open
Target Start Date: 9/1/2010
Expected End Date (for temporary and fixed term positions): 8/31/2011
Created On: Monday, July 19, 2010 1:23:51 PM
Created By: HR Manager_ Test
Modified On: Tuesday, July 27, 2010 2:56:33 PM
Modified By: Maria Chirico - REC
Detail Info
Location: Calgary
Full/Part: Full-Time
Business Unit: UCALT - Trust
Reg/Temp: Temporary
Position Type: Full-time Fixed Term - Grant Funded
Employee Classification: Project - Fixed Term
Experience: Intermediate Level
Education: Other
National Occupancy Code (NOC): 2221 - Biologicl Technologsts & Techs
Relocation: No
Faculty: Faculty of Science
Department: 12090 - Biological Sciences
Unit: Department of Biological Sciences
Work Hours per week: 35.00
Functional Area: Scientific or Technical
Background Check Required: No
Job Families: Technical
Department Description: /
Position Requirements: /
Position Management No. (if applicable): 00098765
Job Profile ID: SCI0123
Position Number of Reporting Manager: 00012345
Recruiting Start Date: 7/19/2010
Recruiting End Date: 7/30/2010
Salary Range: Technical Phase 1 ($3,134.95-$4,560.62 Monthly)
Workflows
Candidate List

The **Main Info** page includes the following information:

- **Approval** - Lists the individuals in the approval workflow and shows date/time stamp
- **General Info** - Includes the position title, number of positions and expected start and end dates
- **Detail Info** - Includes all position details including position type, faculty/department, work hours, job code, position description, etc.
- **Contacts** - Lists the contacts connected to the requisitions (i.e. those individuals who have access to view the requisition and the associated candidates)

The **Additional Info** page includes the following:

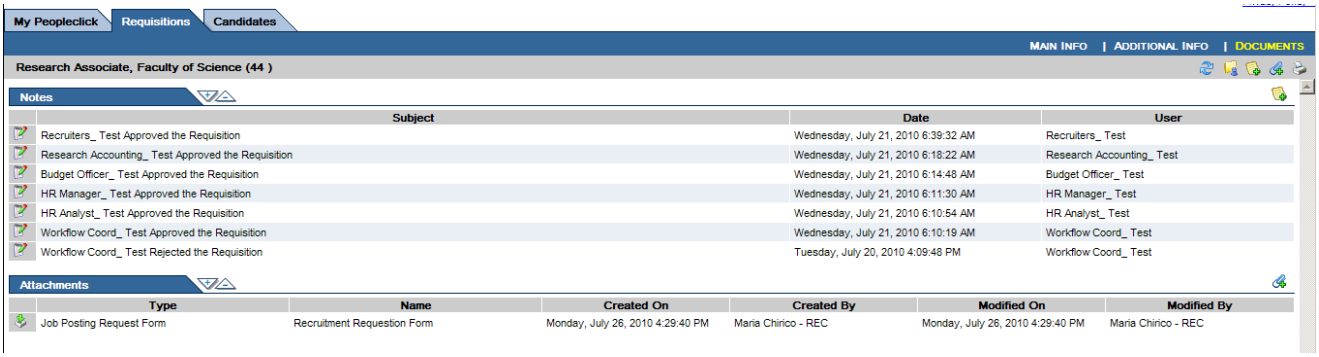
- **Earnings Distribution** - Breakdown of accounting chartfields the position will be charged to
- **Costs** - Any additional costs associated with the requisition (i.e. advertising costs)



VIEW REQUISITION INFORMATION (CONTINUED)

The **Documents** page includes:

- **Notes** – Any information relevant to the requisition
- **Attachments** – Any documents connected to this requisition (i.e. Recruitment Request Form)



To view a note, click on the to the left of the note

To view an attachment, hold down the 'Ctrl' key and click on the next to the document.

To Add a Note

1. Click the **Create New Note** ( ) icon
2. Enter a subject for the note
3. Click the **Public Note** check box to make the note public (viewable by all users with access to the requisition). If unchecked, it is private and viewable only by you
4. Click **Save**

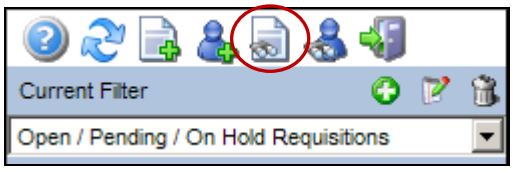
To Edit a Note

1. Click the **Edit** ( ) icon
2. Make changes to the note
3. Click the **Update** button to save changes to the note

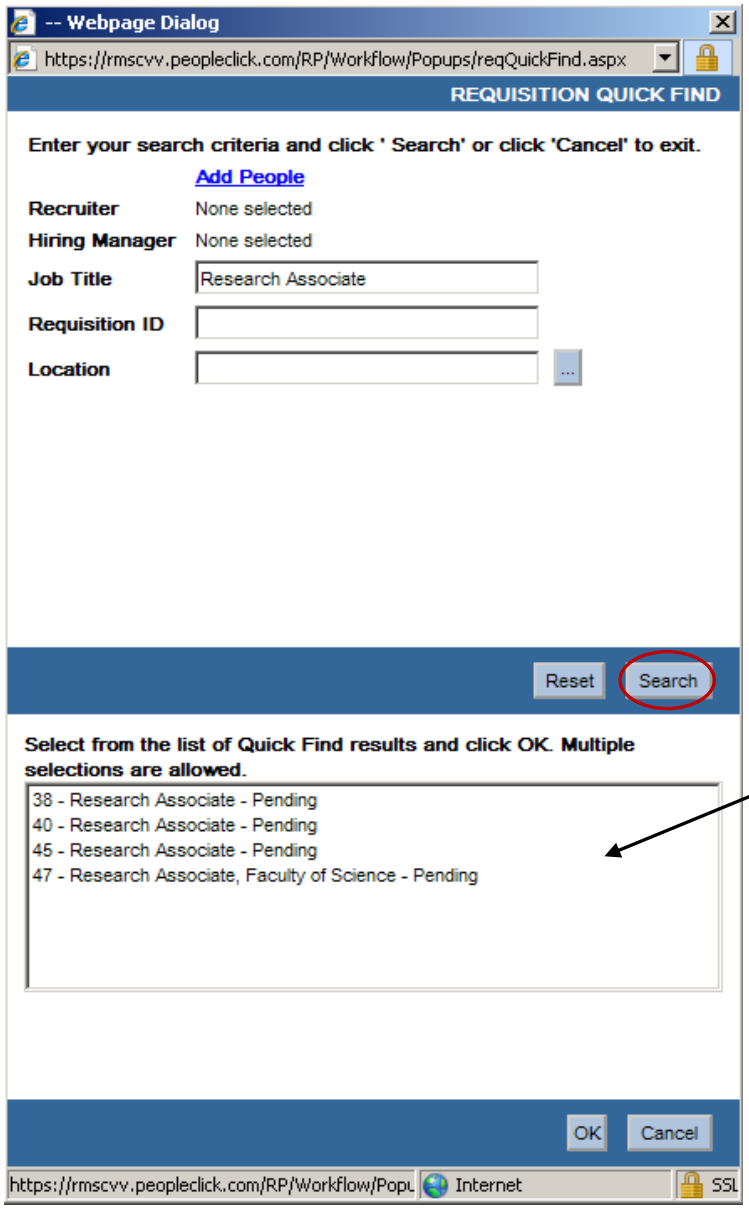
To Add an Attachment

1. Click the **Add/Replace Attachment** ( ) icon
2. Enter a New File Description
3. Choose an Attachment Type
4. Enter the File name or click **Browse** to search for it
5. Click **Upload File**

SEARCH FOR A REQUISITION



Use **Find Requisition** ( ) icon to search for a specific requisition.

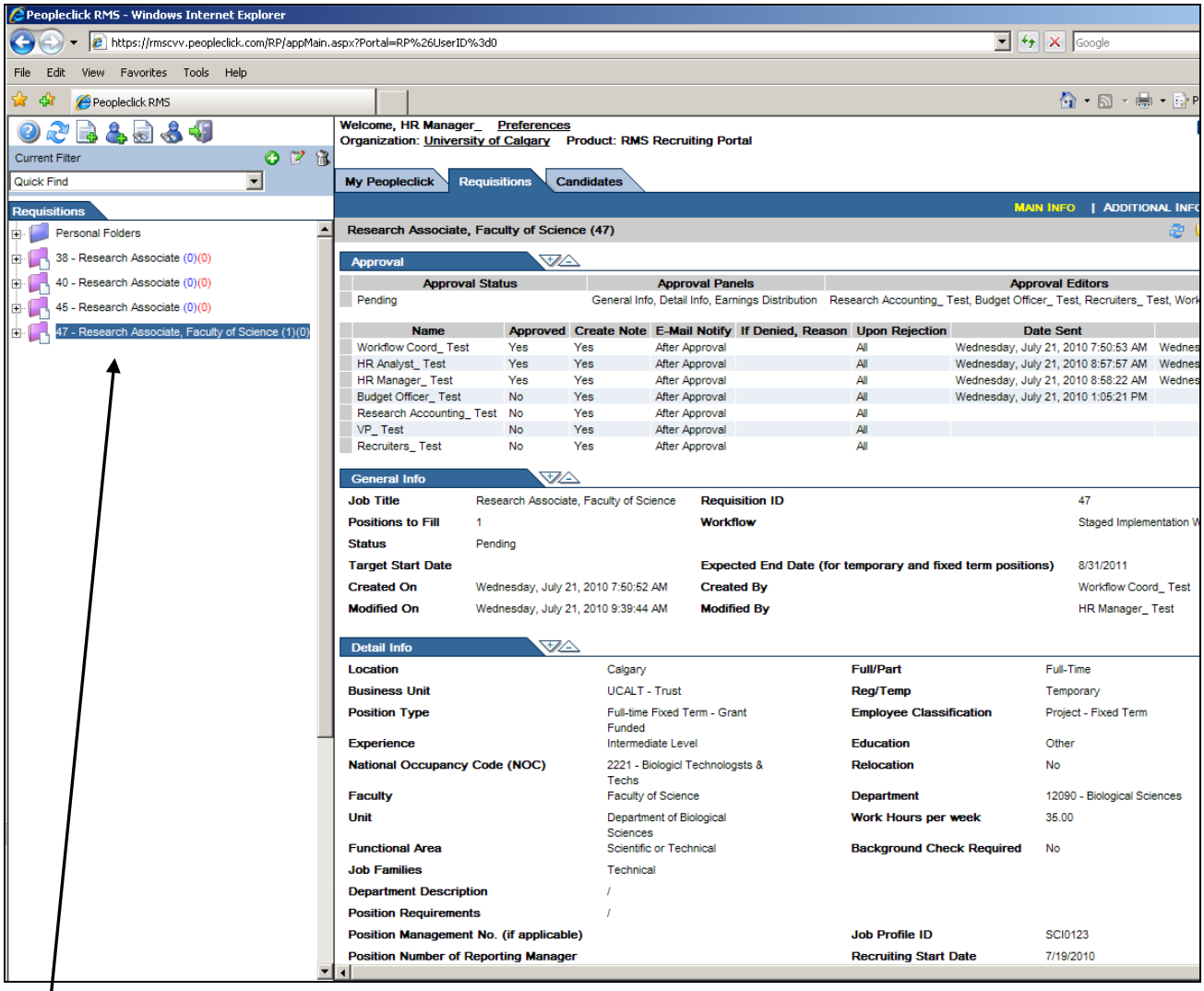


A search box will appear and you can search by Job Title, Requisition ID or Recruiter/Hiring Manager.

After entering search criteria, click Search .

Matches display in the box below. Select one or more requisitions from the list and click OK (more than one selection can be made using the 'Ctrl' key).

SEARCH FOR A REQUISITION (CONTINUED)

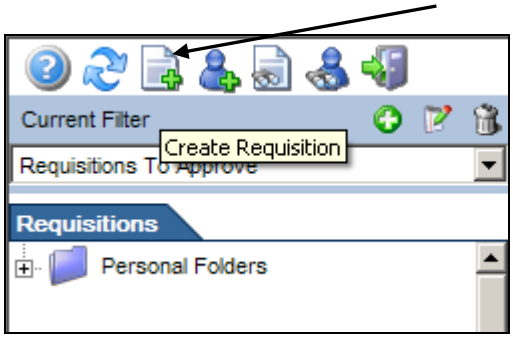

Peopleclick RMS - Windows Internet Explorer
https://rmscvv.peopleclick.com/RP/appMain.aspx?Portal=RP%26UserID%3d0
File Edit View Favorites Tools Help
Peopleclick RMS
Current Filter
Quick Find
Requisitions
Personal Folders
38 - Research Associate (0)(0)
40 - Research Associate (0)(0)
45 - Research Associate (0)(0)
47 - Research Associate, Faculty of Science (1)(0)
Welcome, HR Manager_ Preferences
Organization: University of Calgary Product: RMS Recruiting Portal
My Peopleclick
Requisitions
Candidates
MAIN INFO | ADDITIONAL INFO
Research Associate, Faculty of Science (47)
Approval
Approval Status
Approval Panels
Approval Editors
Pending
General Info, Detail Info, Earnings Distribution
Research Accounting_ Test, Budget Officer_ Test, Recruiters_ Test, Work
Name
Approved
Create Note
E-Mail Notify
If Denied, Reason
Upon Rejection
Date Sent
Workflow Coord_ Test Yes Yes After Approval All Wednesday, July 21, 2010 7:50:53 AM
HR Analyst_ Test Yes Yes After Approval All Wednesday, July 21, 2010 8:57:57 AM
HR Manager_ Test Yes Yes After Approval All Wednesday, July 21, 2010 8:58:22 AM
Budget Officer_ Test No Yes After Approval All Wednesday, July 21, 2010 1:05:21 PM
Research Accounting_ Test No Yes After Approval All
VP_ Test No Yes After Approval All
Recruiters_ Test No Yes After Approval All
General Info
Job Title Research Associate, Faculty of Science
Requisition ID 47
Positions to Fill 1
Workflow Staged Implementation W
Status Pending
Target Start Date
Expected End Date (for temporary and fixed term positions) 8/31/2011
Created On Wednesday, July 21, 2010 7:50:52 AM
Created By Workflow Coord_ Test
Modified On Wednesday, July 21, 2010 9:39:44 AM
Modified By HR Manager_ Test
Detail Info
Location Calgary
Full/Part Full-Time
Business Unit UCALT - Trust
Reg/Temp Temporary
Position Type Full-time Fixed Term - Grant Funded
Employee Classification Project - Fixed Term
Experience Intermediate Level
Education Other
National Occupancy Code (NOC) 2221 - Biologicl Technologsts & Techs
Relocation No
Faculty Faculty of Science
Department 12090 - Biological Sciences
Unit Department of Biological Sciences
Work Hours per week 35.00
Functional Area Scientific or Technical
Background Check Required No
Job Families Technical
Department Description /
Position Requirements /
Position Management No. (if applicable)
Job Profile ID SCI0123
Position Number of Reporting Manager
Recruiting Start Date 7/19/2010

Selected requisitions will appear in the Workflow Frame.

CREATING REQUISITIONS IN PEOPLECLICK WITH AN APPROVAL PROCESS

CREATING REQUISITIONS

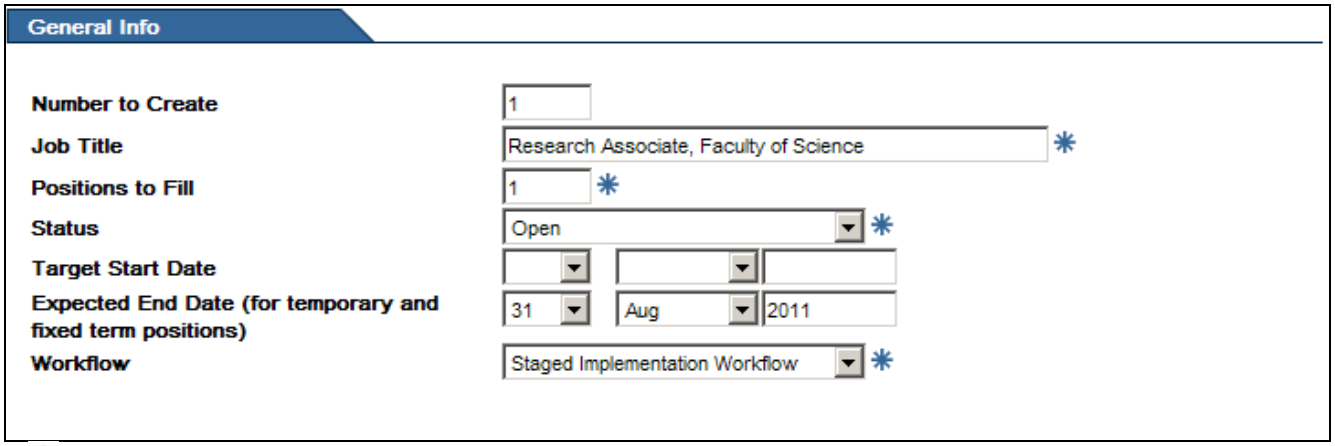
1. In the workflow tree, click the **Create Requisition** ( ) icon



2. Update the following fields under **General Info**:

   (refer to Posting/Approval Request Form for requisition information)

Peopleclick Field	Field Description
Number to Create	Number of requisitions to create (default = 1)
Job Title	Position title
Positions to Fill	Number of positions to fill
Status	Defaulted to 'Open', will automatically change to 'Pending' once approvals are initiated
Target Start Date	Enter the anticipated start date for the position (dd/mon/yyyy)
Expected End Date (for temporary and fixed term positions)	Enter the expected end date for the position (dd/mon/yyyy) Must be entered for all temporary, limited term and fixed term positions
Workflow	**Select 'Staged Implementation Workflow'**

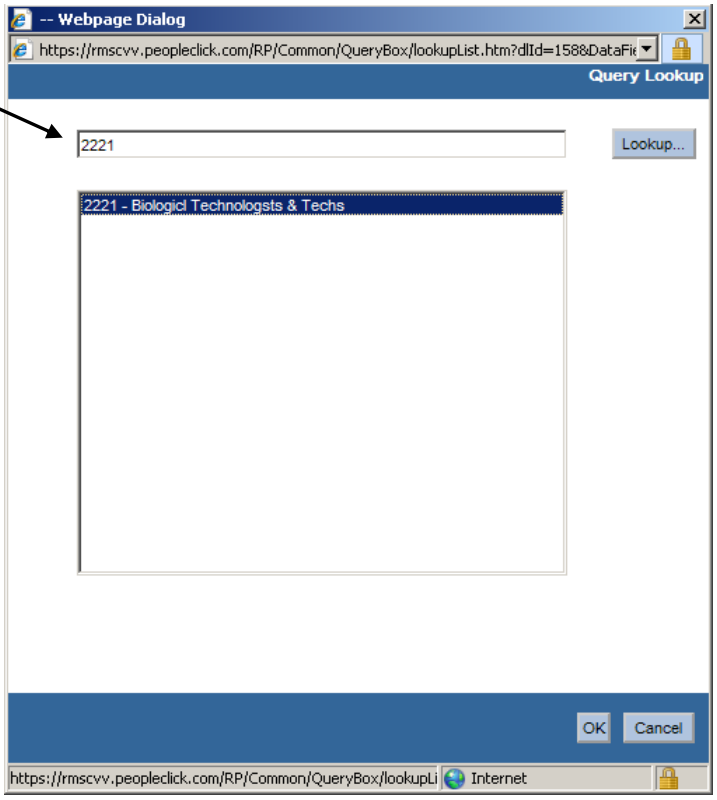


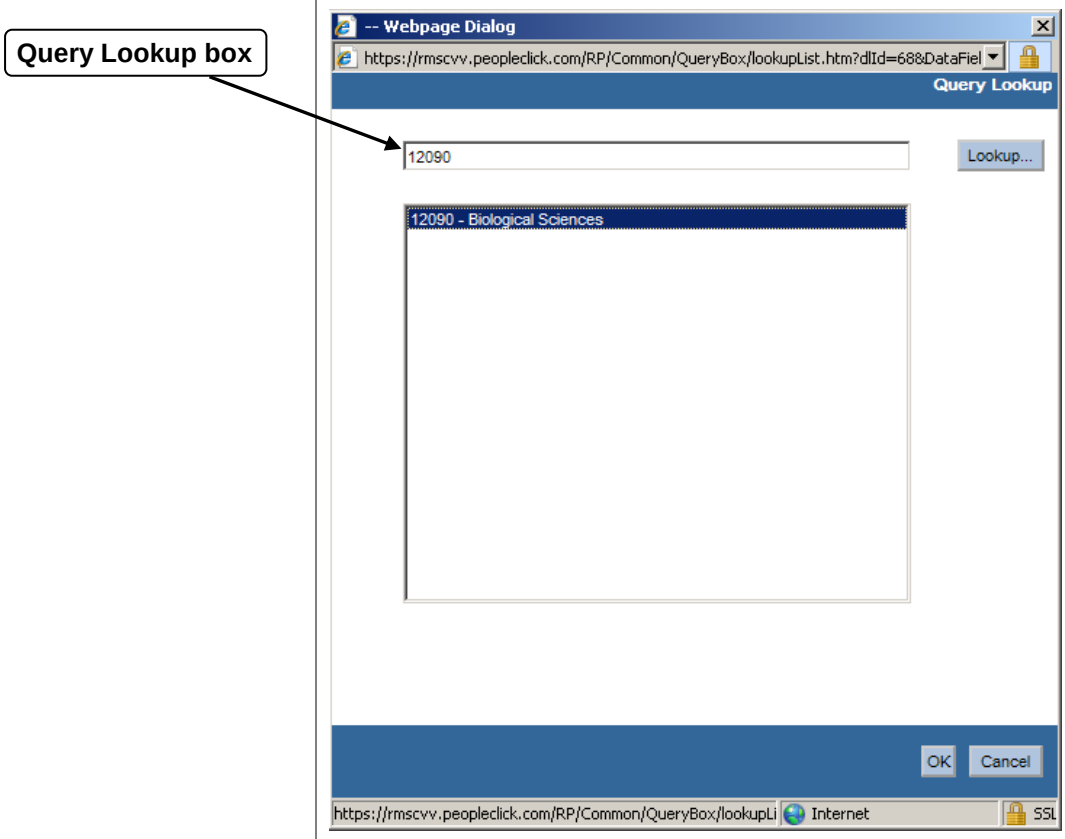
* = Required Field

3. Update the following fields under **Detail Info:**

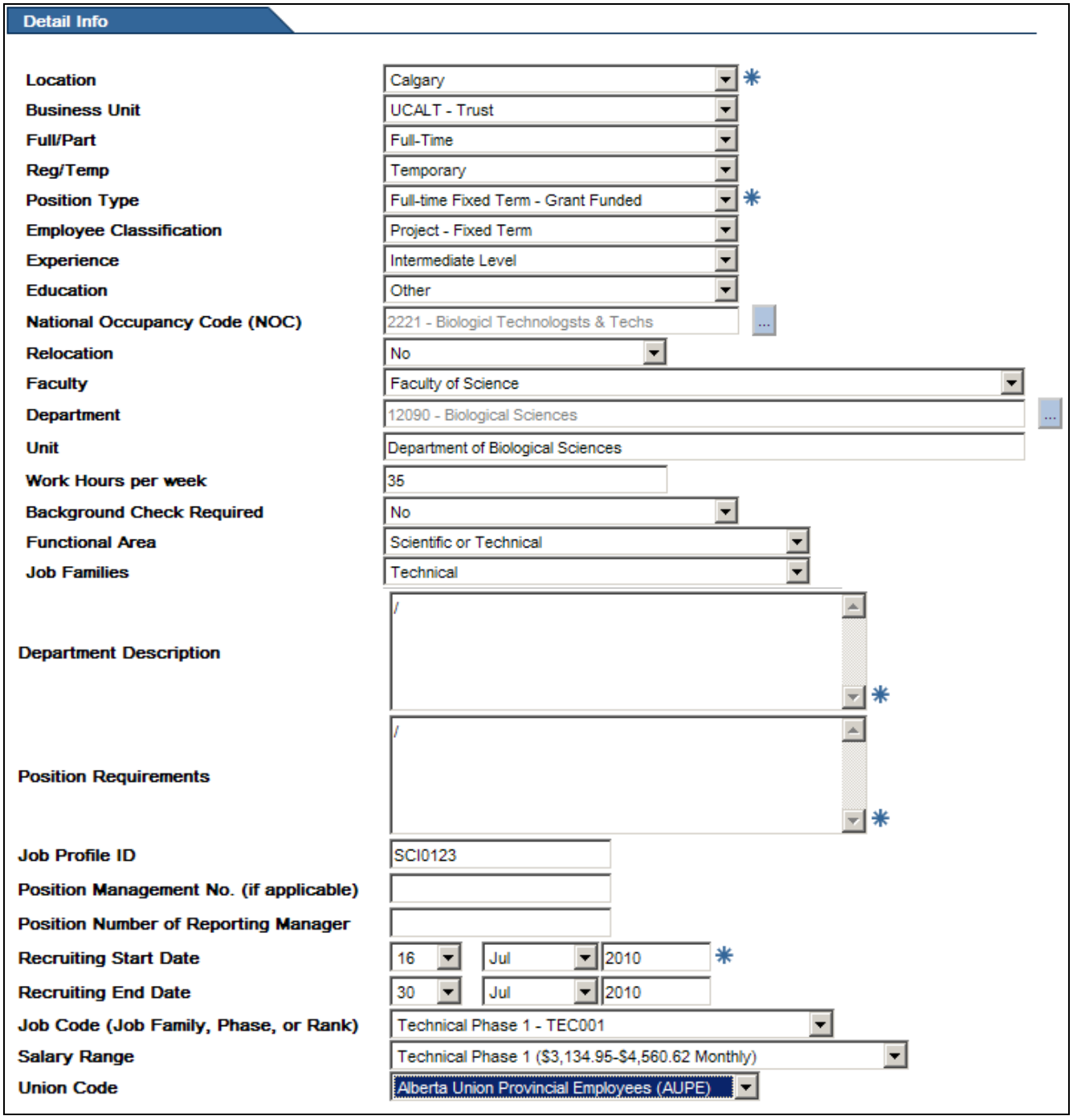
<table>
<tr><th>Peopleclick Field</th><th>Field Description</th></tr>
<tr><td>Location</td><td>Select position location ‘Calgary’, ‘Edmonton’ or ‘Qatar’</td></tr>
<tr><td>Business Unit</td><td>Select appropriate Business Unit i.e.) UCALG – Operating, UCALT - Trust</td></tr>
<tr><td>Full/Part</td><td>Select ‘Part-time’ or Full-time’</td></tr>
<tr><td>Reg/Temp</td><td>Select ‘Temporary’ or ‘Regular’

<table><tr><th>Position Type</th><th>Regular/Temporary</th></tr><tr><td>Regular (Full/Part-time)</td><td>Regular</td></tr><tr><td>Recurring Part-time (Fixed Term/Operating)</td><td>Temporary</td></tr><tr><td>Temporary (Full/Part-time)</td><td>Temporary</td></tr><tr><td>Limited Term (Full/Part-time)</td><td>Temporary</td></tr><tr><td>Sessional (Full/Part-time)</td><td>Regular</td></tr><tr><td>Fixed Term (Full/Part-time)</td><td>Regular</td></tr><tr><td>Fixed Short Term (Full/Part-time)</td><td>Temporary</td></tr></table></td></tr>
<tr><td>Position Type</td><td>Select appropriate position type i.e.) Full-time Regular, Part-time Regular, Full-time Fixed Term and Part-time Fixed Term. This field will be viewable to candidates on the job posting.</td></tr>
<tr><td>Employee Classification</td><td>Select appropriate employee class i.e.) Regular, Temporary Relief, Limited Term and Recurring Part-time</td></tr>
<tr><td>Experience</td><td>Select experience level – Entry, Intermediate or Senior level</td></tr>
<tr><td>Education</td><td>Desired level of Education (minimum required)</td></tr>
</table>

National Occupancy Code (NOC)	Search for the four digit NOC by selecting the **Lookup** ( ) icon. The appropriate NOC is located on the Posting/Approval Request Form or Job Profile. Enter the four digit NOC in the Query Lookup box and click Lookup... . ***Note:*** If searching by the NOC description, enter '%' before the NOC description (i.e. %Biological Technologists & Techs) *If you are unsure of the appropriate NOC, please leave blank. **Query Lookup box**  Highlight the appropriate NOC and select OK
Relocation	Select if relocation will be offered for this position
Faculty	Select appropriate faculty from drop down menu

Department	Search for the Department by selecting the **Lookup** ( ) icon. Enter the Department number in the Query Lookup box and click Lookup... . ***Note:*** If searching by the department name, enter '%' before the department name (i.e. %Biological Science)  Highlight the appropriate Department and select OK
Unit (if applicable)	Enter Department or Unit. This field along with Faculty will appear on the job posting
Work Hours per week	Total number of hours working per week
Background Check Required	Select whether a background check is required for this role
Functional Area	Select appropriate functional area from the drop down menu
Job Families	Select applicable job family
Department Description	This section will be completed by the Recruiter based on information from the job profile, however if you have any information you would like included in the posting around the work environment (i.e. overview of the department, lab or project), include it here. If there is nothing specific you would like to add, just enter '/'

Position Requirements	This section will also be completed by the Recruiter based on information from the job profile, however if you would like to highlight the key responsibilities or qualifications, you can do so here. If there is nothing specific you would like to add, just enter '/'
Job Profile ID	Enter UCPL #
Position Management No. (if applicable)	If this position has employees reporting to it, ensure there is a position management #
Position # of Reporting Manager	Enter the position # of the manager this position reports to
Recruiting Start Date	Recruiting start date will auto populate
Recruiting End Date	Select closing date if known (May be adjusted by Recruiter depending on timing of approvals)
Job Code (Job Family, Phase, or Rank)	Select applicable job family, phase, or rank
Salary Range	Select corresponding salary range
Union Code	Select corresponding union code

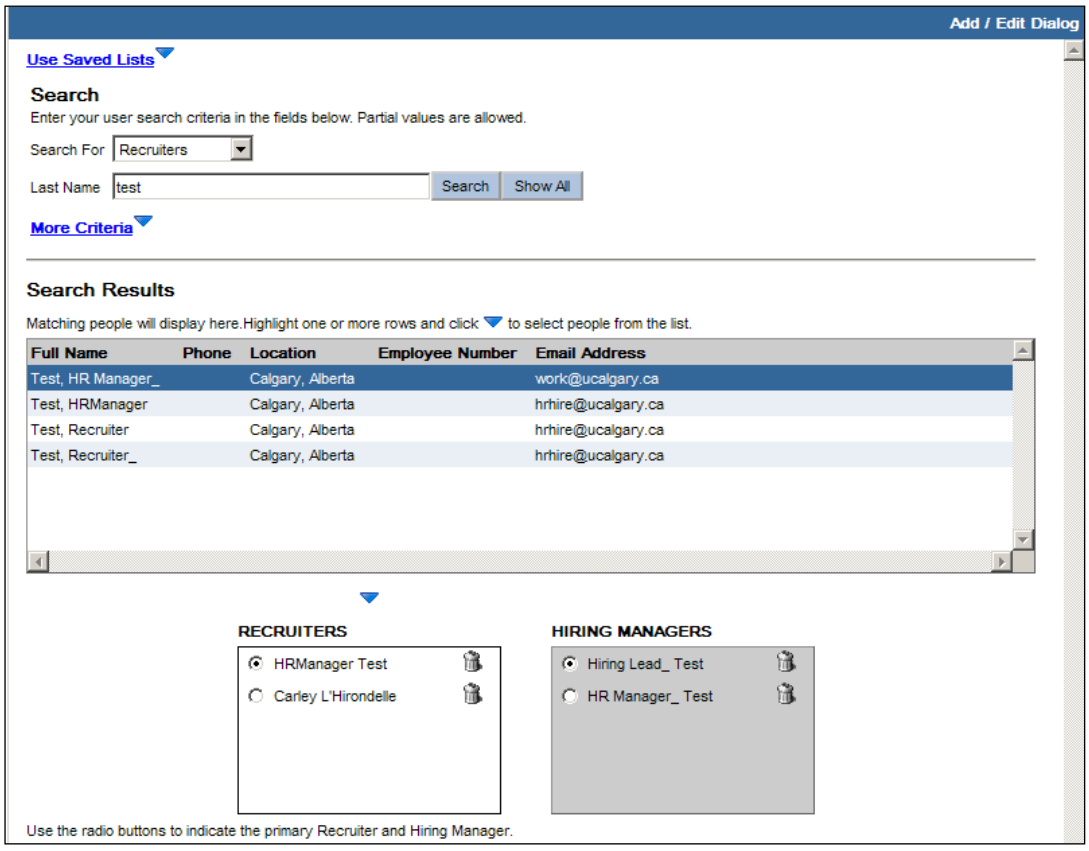

Detail Info
Location
Calgary
Business Unit
UCALT - Trust
Full/Part
Full-Time
Reg/Temp
Temporary
Position Type
Full-time Fixed Term - Grant Funded
Employee Classification
Project - Fixed Term
Experience
Intermediate Level
Education
Other
National Occupancy Code (NOC)
2221 - Biologicl Technologsts & Techs
Relocation
No
Faculty
Faculty of Science
Department
12090 - Biological Sciences
Unit
Department of Biological Sciences
Work Hours per week
35
Background Check Required
No
Functional Area
Scientific or Technical
Job Families
Technical
Department Description
/
Position Requirements
/
Job Profile ID
SCI0123
Position Management No. (if applicable)
Position Number of Reporting Manager
Recruiting Start Date
16
Jul
2010
Recruiting End Date
30
Jul
2010
Job Code (Job Family, Phase, or Rank)
Technical Phase 1 - TEC001
Salary Range
Technical Phase 1 ($3,134.95-$4,560.62 Monthly)
Union Code
Alberta Union Provincial Employees (AUPE)

4. Update the **Contacts** – Recruiter and Hiring Managers

a) Select **Add People**

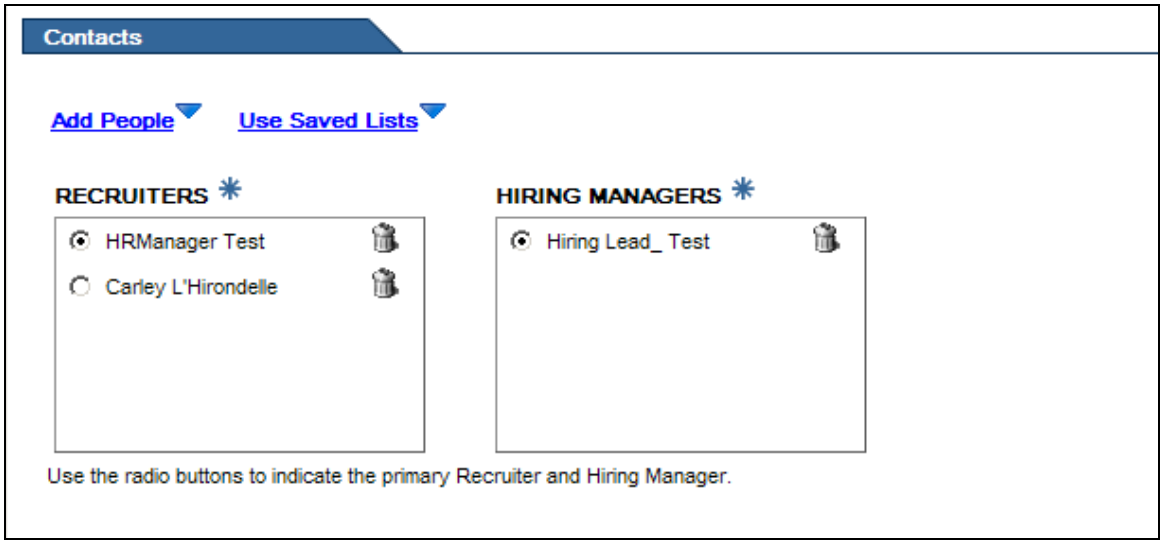
b) Select "Recruiters" or "Hiring Managers" in the **Search For** drop down menu. Enter the last name of the person you are searching for and click Search.

c) Add the desired names to the **Recruiters** or **Hiring Managers** box. To add a name to the highlighted box, double-click the name in the Search Results list or highlight the name and click the ▼ arrow. To remove a name from a box, click the 🗑 icon next to the name you want to remove.


Add / Edit Dialog
Use Saved Lists
Search
Enter your user search criteria in the fields below. Partial values are allowed.
Search For Recruiters
Last Name test
Search
Show All
More Criteria
Search Results
Matching people will display here.Highlight one or more rows and click ▼ to select people from the list.
Full Name Phone Location Employee Number Email Address
Test, HR Manager_ Calgary, Alberta work@ucalgary.ca
Test, HRManager Calgary, Alberta hrhire@ucalgary.ca
Test, Recruiter Calgary, Alberta hrhire@ucalgary.ca
Test, Recruiter_ Calgary, Alberta hrhire@ucalgary.ca
RECRUITERS
HRManager Test
Carley L'Hirondelle
HIRING MANAGERS
Hiring Lead_ Test
HR Manager_ Test
Use the radio buttons to indicate the primary Recruiter and Hiring Manager.

d) Repeat these steps to select additional recruiters and hiring managers.

e) When the names in the Recruiters and Hiring Managers boxes are correct, specify a ***primary*** **Recruiter** and a ***primary*** **Hiring Manager**. Do so by clicking the radio buttons (◉) next to the desired primary recruiter and the desired primary hiring manager.



IMPORTANT NOTE:

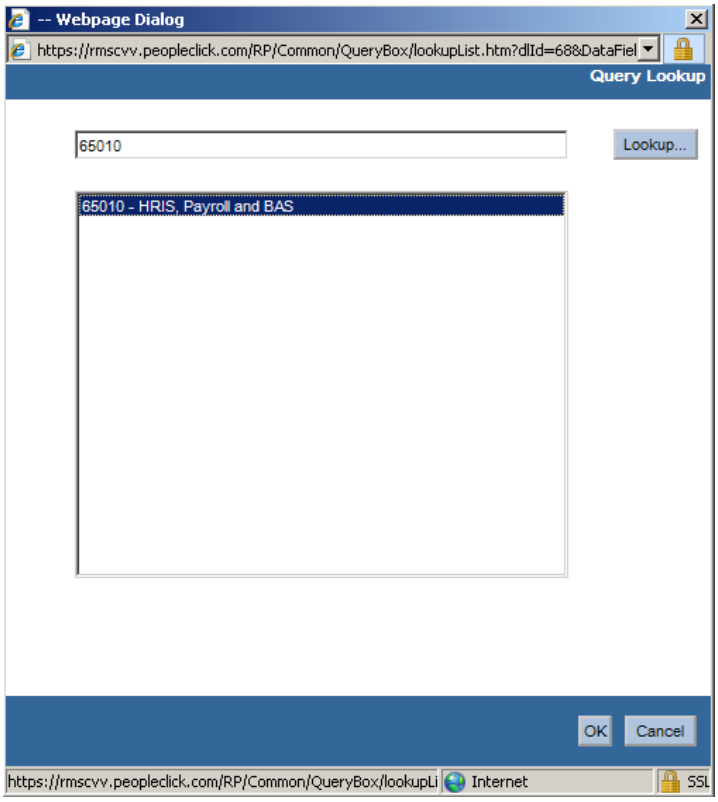
Please ensure an HR Services Team member is selected as the **Primary Recruiter** and a Central HR Recruiter as the secondary contact.

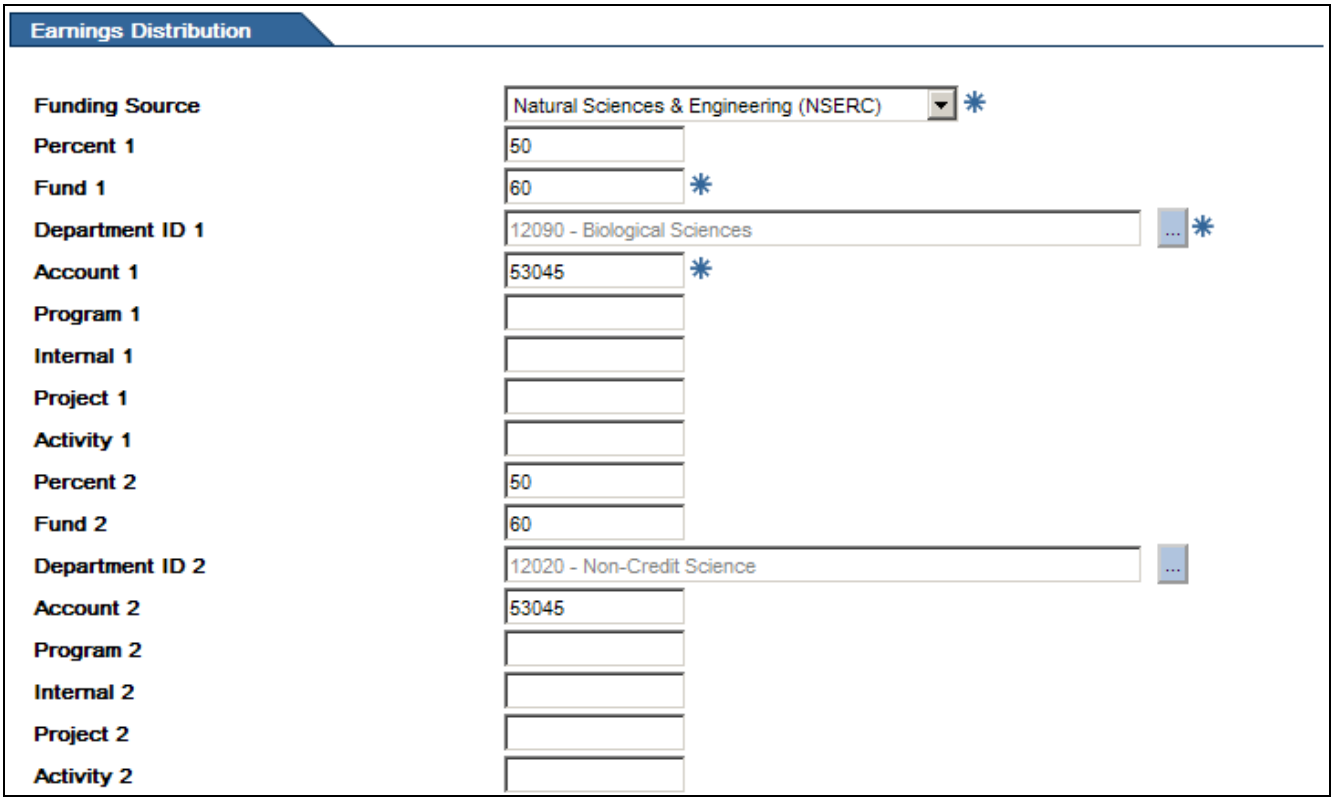
Please ensure the Hiring Lead/Budget Owner is selected as the **Primary Hiring Manager** and any Admins, Resource Managers etc. as secondary contacts.

Primary Recruiter / Hiring Manager selection feeds email triggers in the workflow.

5. Update **Earnings Distribution**
Enter the earnings distribution as approved by the Budget Officer or RFA.

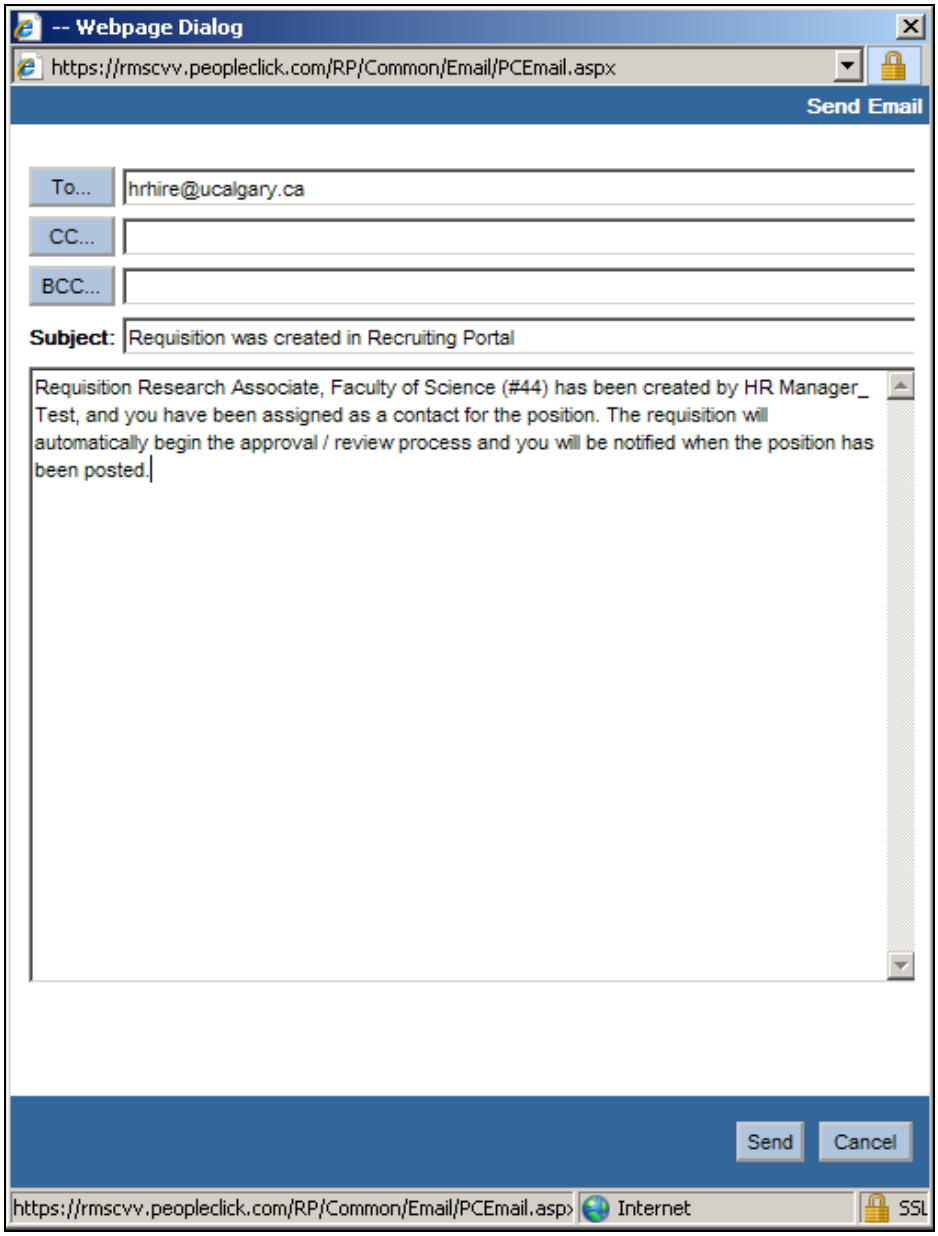
NOTE: Earnings can be distributed between a maximum of four different chartfields. In addition, benefits and salary can be charged to separate accounts.

Peopleclick Field	Field Description
Funding Source	Select appropriate funding source from the drop down menu i.e.) N/A – Operating, Natural Sciences and Engineering (NSERC) ***Note:*** Select N/A Operating for all Partnership Projects
Percent 1	Enter the percent to be charged to that accounting string (i.e. 50) or enter 'benefit' if only benefits are to be charged to that accounting string
Fund 1	Enter the appropriate Fund ID
Department ID 1	Search for the Department ID by selecting the **Lookup** (...) icon. Enter the Department ID in the Query Lookup box and click Lookup... .  Highlight the appropriate Department ID and select OK
Account 1	Enter appropriate Account number
Program 1	Enter if applicable
Internal 1	Enter if applicable
Project 1	Enter if applicable
Activity 1	Enter if applicable



6. Once you have completed the requisition, click Create.

7. An email trigger will appear to notify the Hiring Lead (Primary Hiring Manager) that the requisition has been created and is currently in the approval/review process. Click Send and the HR Team and Hiring Lead will be notified by the Recruitment Team once all approvals have been obtained and the position has been posted.

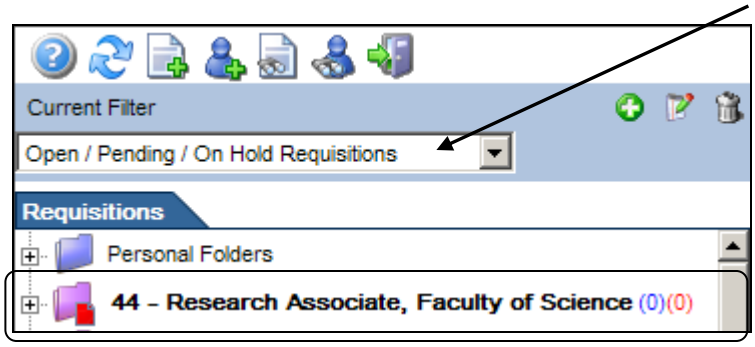

-- Webpage Dialog
https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.aspx
Send Email
To...
hrhire@ucalgary.ca
CC...
BCC...
Subject:
Requisition was created in Recruiting Portal
Requisition Research Associate, Faculty of Science (#44) has been created by HR Manager_ Test, and you have been assigned as a contact for the position. The requisition will automatically begin the approval / review process and you will be notified when the position has been posted.
Send
Cancel
https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.asp
Internet
SSL

If you click **Cancel**, the email will not be sent.

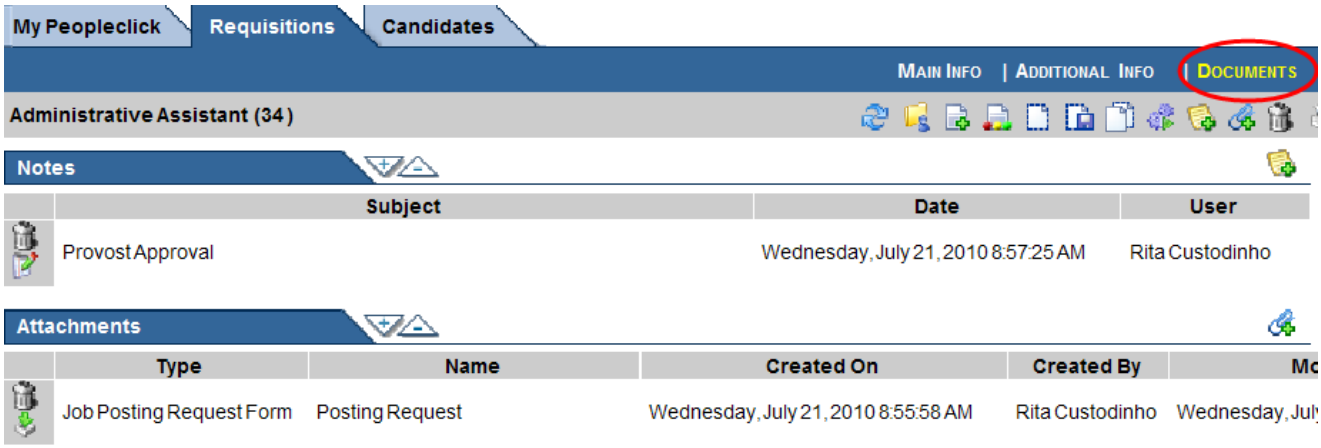
8. Your newly created requisition will appear in the workflow tree under filter **Open / Pending / On Hold Requisitions** and will be in 'Pending' status which is denoted by the purple folder.

Note:

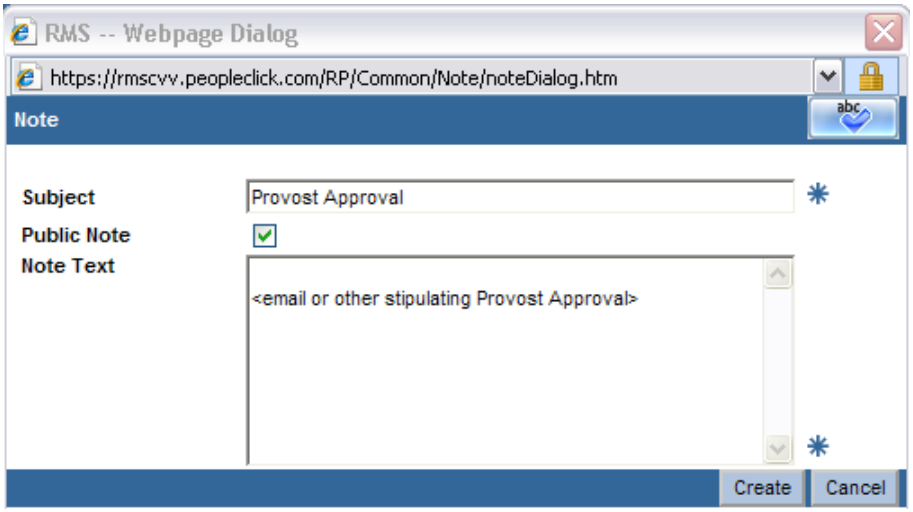
- Positions in 'Open' status are green
- Positions in 'Pending' status are purple


Current Filter
Open / Pending / On Hold Requisitions
Requisitions
Personal Folders
44 – Research Associate, Faculty of Science (0)(0)

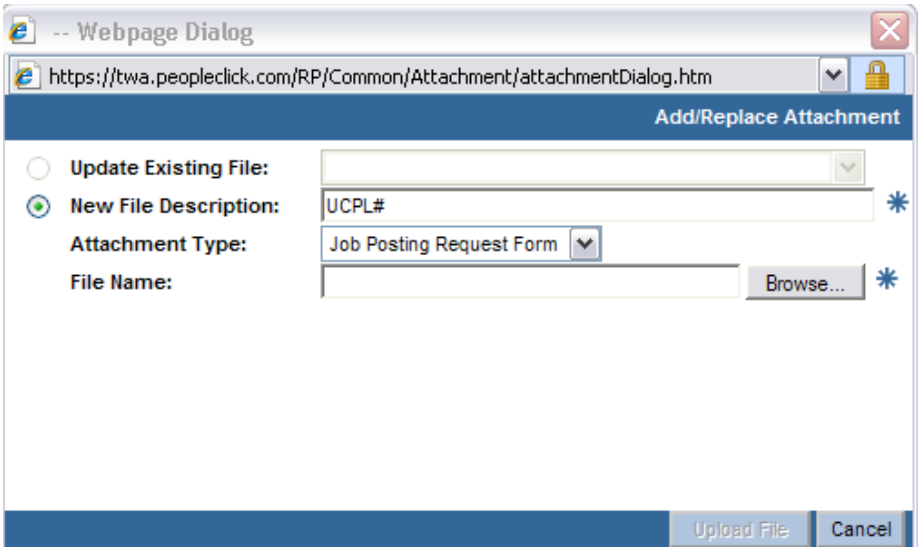
9. Attach all required documents to the requisition (Provost approval, Recruitment Request form and Posting Request form) in the **Documents** section



- Click the **Add New Note** ( ) icon in the Requisitions toolbar.

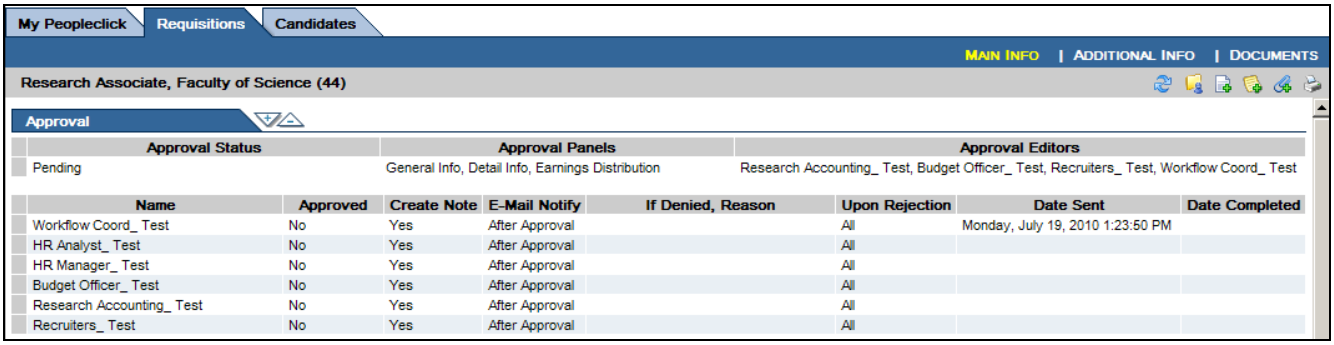


- Click the **Add/Replace Attachment** ( ) icon in the Requisitions toolbar



- Use the UCPL# as New File Description for the Job Posting Request Form.

10. To monitor the approval/review process, view the **Approval** section of the pending requisition (on the **Main Info** page).

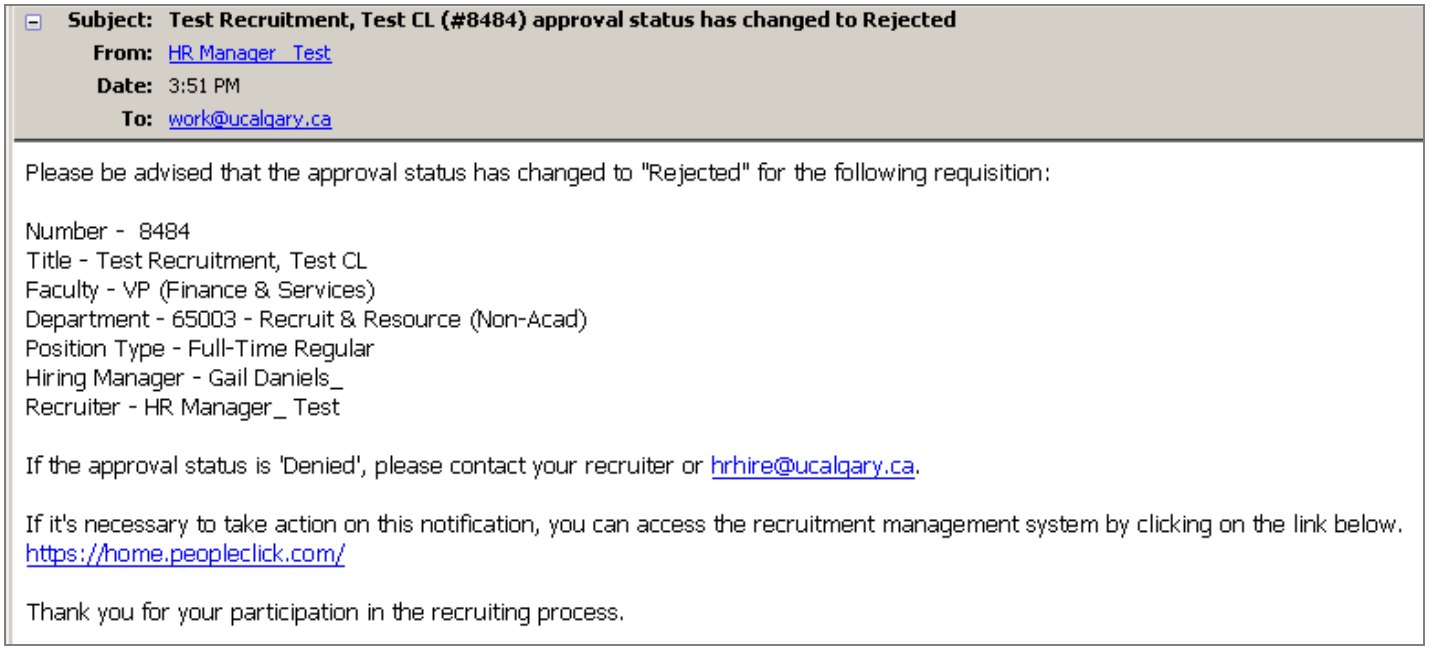


APPROVAL WORKFLOW REJECTIONS

REJECTED / DENIED REQUISITIONS IN PEOPLECLICK

What happens if a requisition is denied?

- If at any point in the approval process an approver rejects the requisition, the Primary HR Contact will receive an email notification:



Subject: Test Recruitment, Test CL (#8484) approval status has changed to Rejected
From: HR Manager Test
Date: 3:51 PM
To: work@ucalgary.ca

Please be advised that the approval status has changed to "Rejected" for the following requisition:

Number - 8484
Title - Test Recruitment, Test CL
Faculty - VP (Finance & Services)
Department - 65003 - Recruit & Resource (Non-Acad)
Position Type - Full-Time Regular
Hiring Manager - Gail Daniels_
Recruiter - HR Manager_ Test

If the approval status is 'Denied', please contact your recruiter or hrhire@ucalgary.ca.

If it's necessary to take action on this notification, you can access the recruitment management system by clicking on the link below.
https://home.peopleclick.com/

Thank you for your participation in the recruiting process.

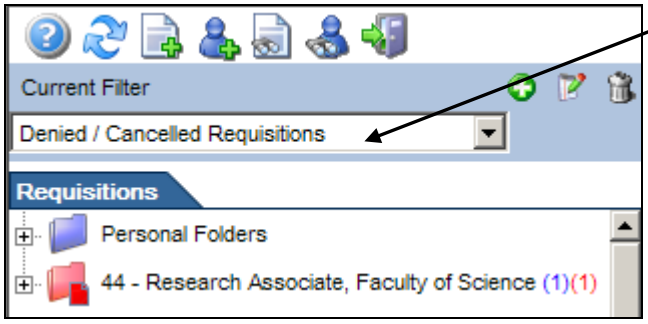
After receiving notification that a requisition has been rejected, you may need to review the requisition information. In addition, you may need to edit requisition information. For example, you might need to modify the earnings distribution and/or employee classification for a requisition.

Please contact your recruiter or hrhire@ucalgary.ca to gain access to edit the Peopleclick requisition that was rejected.

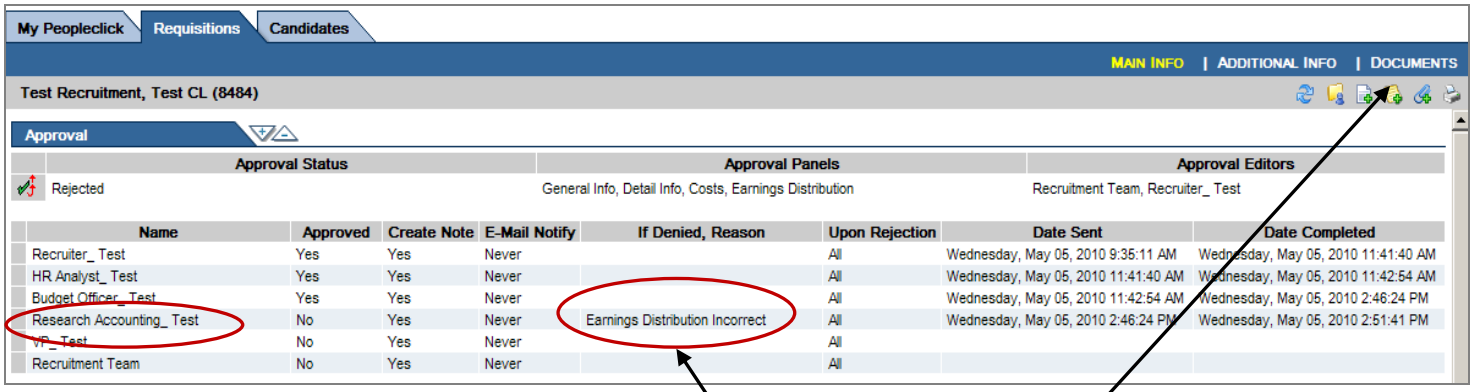
VIEW AND EDIT A DENIED REQUISITION

Requisitions that have been rejected will appear in the workflow tree under filter **Denied / Cancelled Requisitions**

- Positions in **'Denied'** status are red



Under the **Approval** section of the requisition, you can identify the approver and rejection reason.



The rejection reason is listed here, but to view notes with additional details from the approver, see the Notes section under **Documents**.

Depending on the rejection reason, you may need to edit the requisition details under the **Main Info** or **Additional Info** section.

Navigate to the **Detail Info** section under Main Info if you need to edit any of the following:

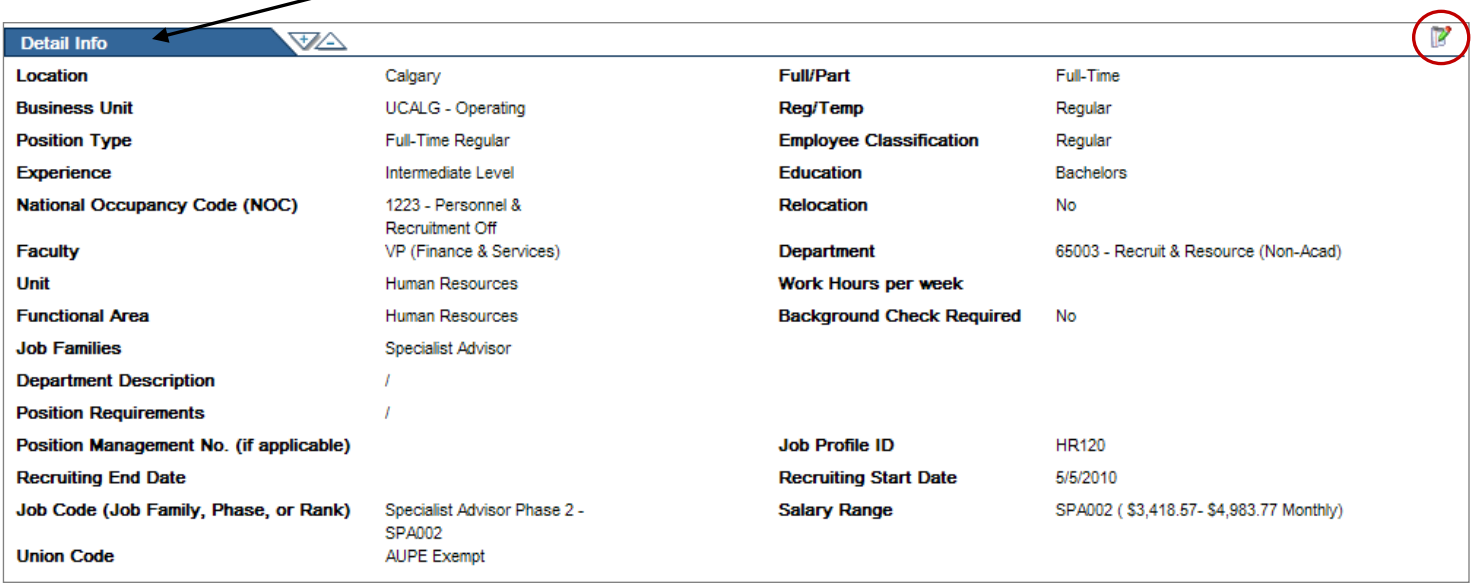
- Business Unit
- Position Type
- Employee Classification
- Job Code
- Salary Range
- Work Hours

Navigate to the **Additional Info** section if you need to edit the following:

- Earnings Distribution

VIEW AND EDIT A REQUISITION (CONTINUED)

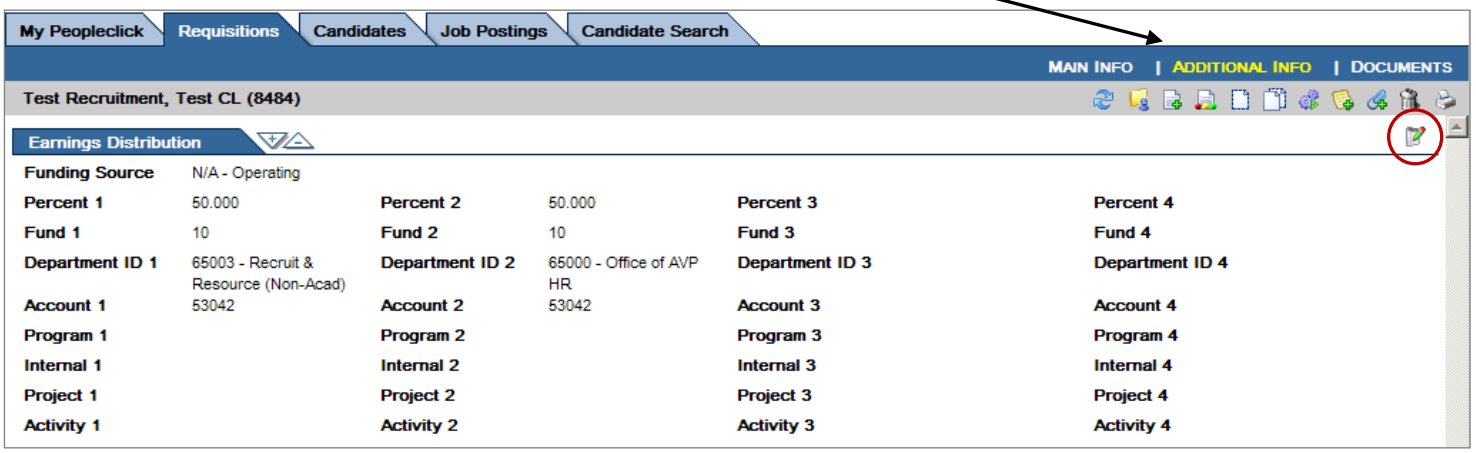
To edit the requisition, navigate to the **Detail Info** section under the Requisitions tab and select the **edit** icon on the right side of the screen



Detail Info

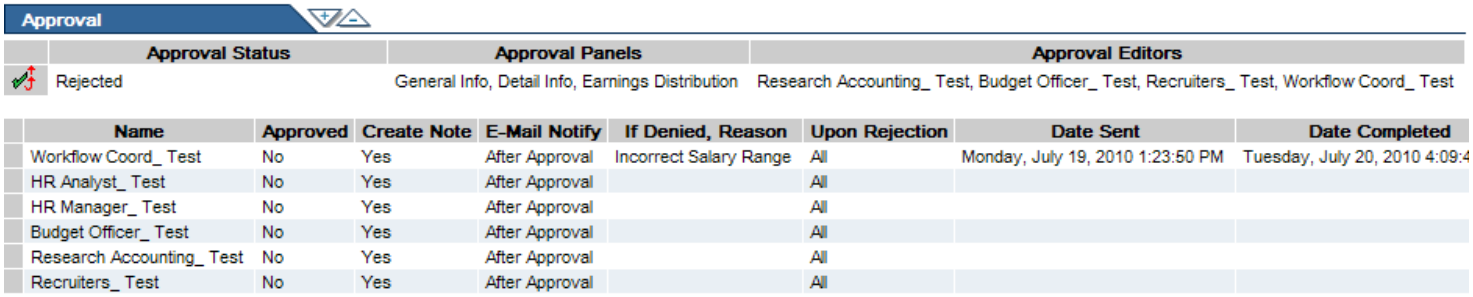
Location	Calgary	**Full/Part**	Full-Time
Business Unit	UCALG - Operating	**Reg/Temp**	Regular
Position Type	Full-Time Regular	**Employee Classification**	Regular
Experience	Intermediate Level	**Education**	Bachelors
National Occupancy Code (NOC)	1223 - Personnel & Recruitment Off	**Relocation**	No
Faculty	VP (Finance & Services)	**Department**	65003 - Recruit & Resource (Non-Acad)
Unit	Human Resources	**Work Hours per week**	
Functional Area	Human Resources	**Background Check Required**	No
Job Families	Specialist Advisor		
Department Description	/		
Position Requirements	/		
Position Management No. (if applicable)		**Job Profile ID**	HR120
Recruiting End Date		**Recruiting Start Date**	5/5/2010
Job Code (Job Family, Phase, or Rank)	Specialist Advisor Phase 2 - SPA002	**Salary Range**	SPA002 ($3,418.57- $4,983.77 Monthly)
Union Code	AUPE Exempt		

To edit the Earnings Distribution, navigate to the **Additional Info** section under the Requisitions tab and select the **edit** icon



VIEW AND EDIT A REQUISITION (CONTINUED)

Once you have made the appropriate edits to the requisition, select the Resubmit icon in the Approvals section.



Approval

Approval Status	Approval Panels	Approval Editors
Rejected	General Info, Detail Info, Earnings Distribution	Research Accounting_ Test, Budget Officer_ Test, Recruiters_ Test, Workflow Coord_ Test

Name	Approved	Create Note	E-Mail Notify	If Denied, Reason	Upon Rejection	Date Sent	Date Completed
Workflow Coord_ Test	No	Yes	After Approval	Incorrect Salary Range	All	Monday, July 19, 2010 1:23:50 PM	Tuesday, July 20, 2010 4:09:4
HR Analyst_ Test	No	Yes	After Approval		All		
HR Manager_ Test	No	Yes	After Approval		All		
Budget Officer_ Test	No	Yes	After Approval		All		
Research Accounting_ Test	No	Yes	After Approval		All		
Recruiters_ Test	No	Yes	After Approval		All		

The resubmitted requisition will be directed to the Workflow Coordinator to determine the next step. Depending on the changes that were made, the Workflow Coordinator may edit the approvers.

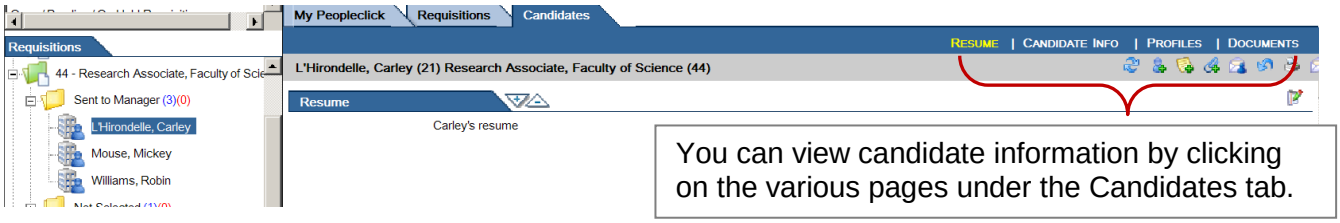
Note: Though the old approval Workflow is replaced with the new one, the original approval notes can be found under the 'Documents' page.

MANAGING CANDIDATES

VIEW CANDIDATE INFORMATION

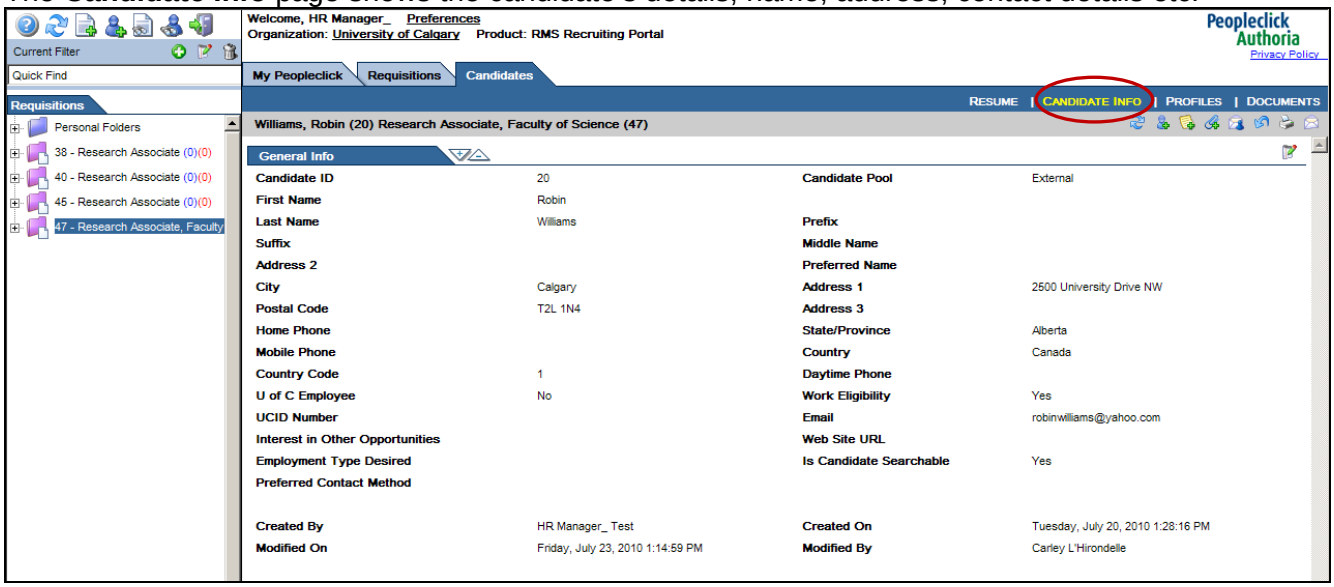
To view the candidates under a requisition, go to the Workflow frame.

1. Click the (+) to the left of the requisition title . The numbers next to the folder name indicate how many candidates are in each folder.
    - The **blue** number designates the total number of candidates in the folder
    - The **red** number designates the number candidates who are new to the folder within the last 24 hours.
2. Click the (+) to the left of the workflow folder
3. Click the candidate's name to display their information in the **Details** frame.


My Peopleclick
Requisitions
Candidates
Requisitions
44 - Research Associate, Faculty of Sci
Sent to Manager (3)(0)
L'Hirondelle, Carley
Mouse, Mickey
Williams, Robin
RESUME | CANDIDATE INFO | PROFILES | DOCUMENTS
L'Hirondelle, Carley (21) Research Associate, Faculty of Science (44)
Resume
Carley's resume
You can view candidate information by clicking on the various pages under the Candidates tab.

The **Resume** page shows the candidate's cover letter and resume.

The **Candidate Info** page shows the candidate's details; name, address, contact details etc.



The **Profiles** page shows the offer information entered via the "Offer Accepted" trigger (see pg. 49), and thus would only show information for the person hired into the position.

VIEW CANDIDATE INFORMATION (CONTINUED)

The **Documents** page shows any attachment relevant to the candidate.

- **Notes** – can include AUPE service date and interview notes
- **Attachments** – includes documents the candidate submitted, such as reference letters and their resume (if they chose to attach it rather than paste it in.

To view a note, simply click on the to the left of the note

To view an attachment, hold down the 'Ctrl' key and click on the next to the document.

To Add a Note

- Click the **Create New Note** ( ) icon
- Enter a subject for the note
- Click the **Public Note** check box to make the note public (viewable by all users with access to the requisition). If unchecked, it is private and viewable only by you
- Click **Save**

To Edit a Note

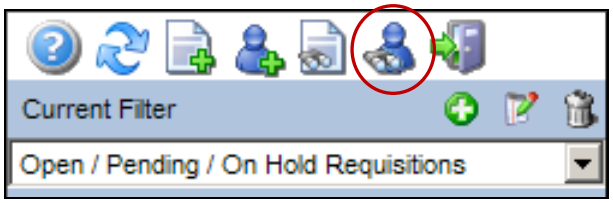
- Click the **Edit** ( ) icon
- Make changes to the note
- Click the **Update** button to save changes to the note

To Add an Attachment

- Click the **Add/Replace Attachment** ( ) icon
- Enter a New File Description
- Choose an Attachment Type
- Enter the File name or click **Browse** to search for it
- Click **Upload File**

SEARCH FOR A CANDIDATE

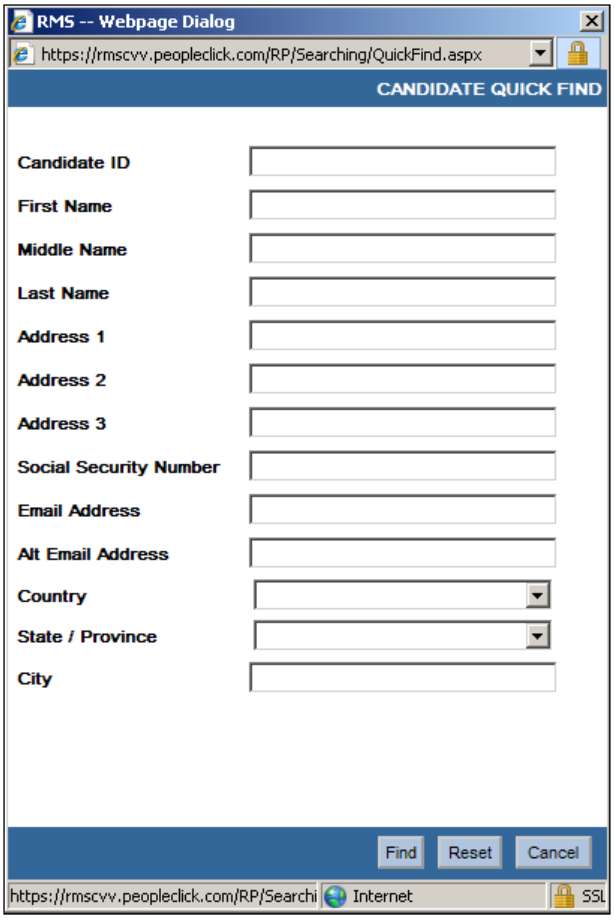
Use the **Candidate Quick Find** ( ) icon to search for a specific candidate.



SEARCH FOR A CANDIDATE (CONTINUED)

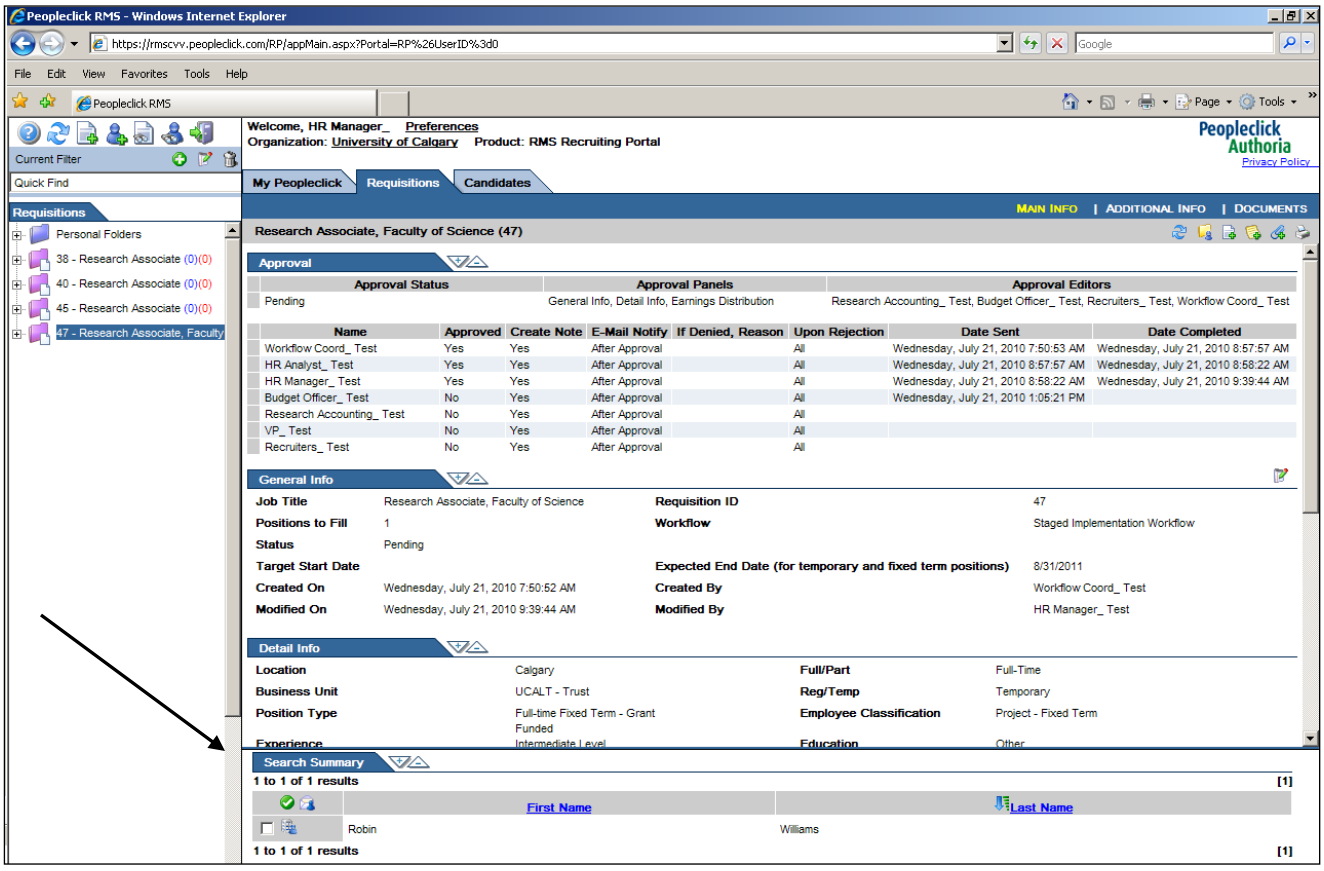
A search box will appear giving you several search options. Name and email searches will be the most common (and will give the best results).

After entering search criteria, click Find.

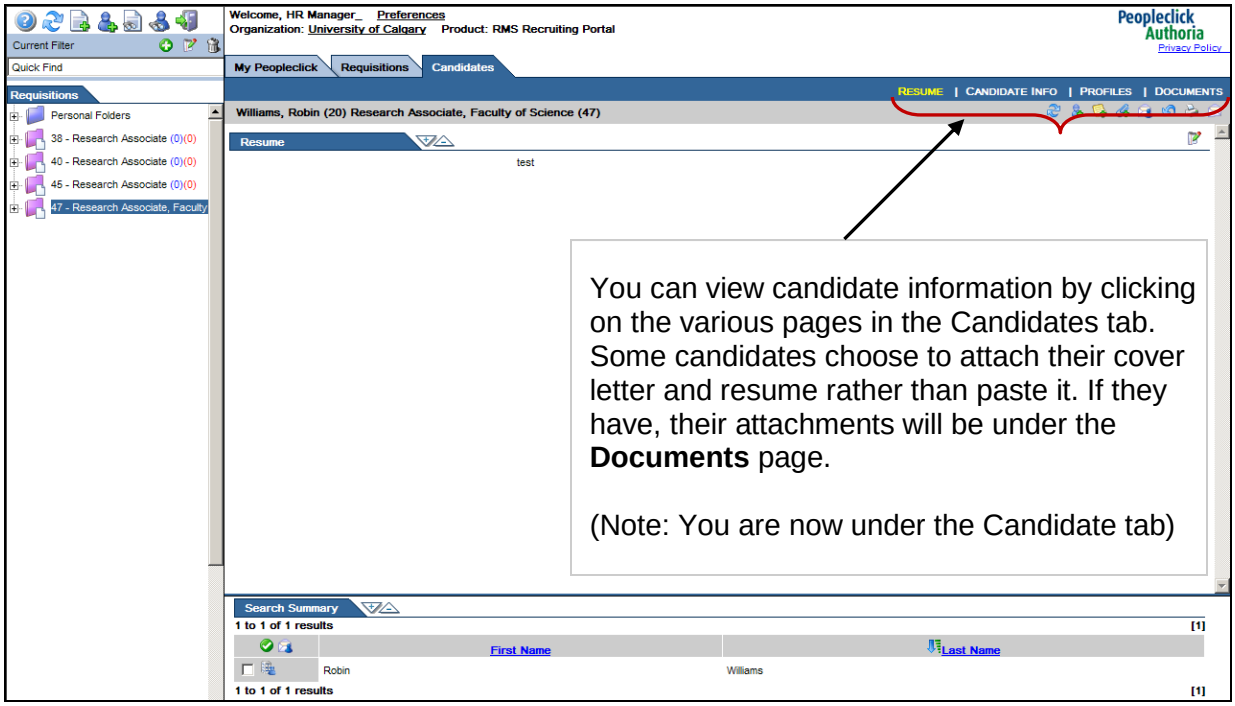


Search results will appear under the **Search Summary** tab.

Click on a name and the candidate's information will appear as shown in the next figure.



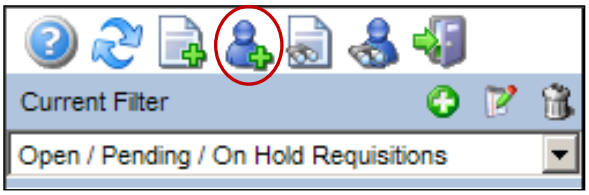
SEARCH FOR A CANDIDATE (CONTINUED)


Welcome, HR Manager_ Preferences
Organization: University of Calgary Product: RMS Recruiting Portal
Peopleclick Authoria
Privacy Policy
Current Filter
Quick Find
Requisitions
Personal Folders
38 - Research Associate (0)(0)
40 - Research Associate (0)(0)
45 - Research Associate (0)(0)
47 - Research Associate, Faculty
My Peopleclick
Requisitions
Candidates
RESUME | CANDIDATE INFO | PROFILES | DOCUMENTS
Williams, Robin (20) Research Associate, Faculty of Science (47)
Resume
test
You can view candidate information by clicking on the various pages in the Candidates tab. Some candidates choose to attach their cover letter and resume rather than paste it. If they have, their attachments will be under the Documents page.
(Note: You are now under the Candidate tab)
Search Summary
1 to 1 of 1 results
[1]
First Name
Last Name
Robin
Williams
1 to 1 of 1 results
[1]

CREATE A CANDIDATE RECORD

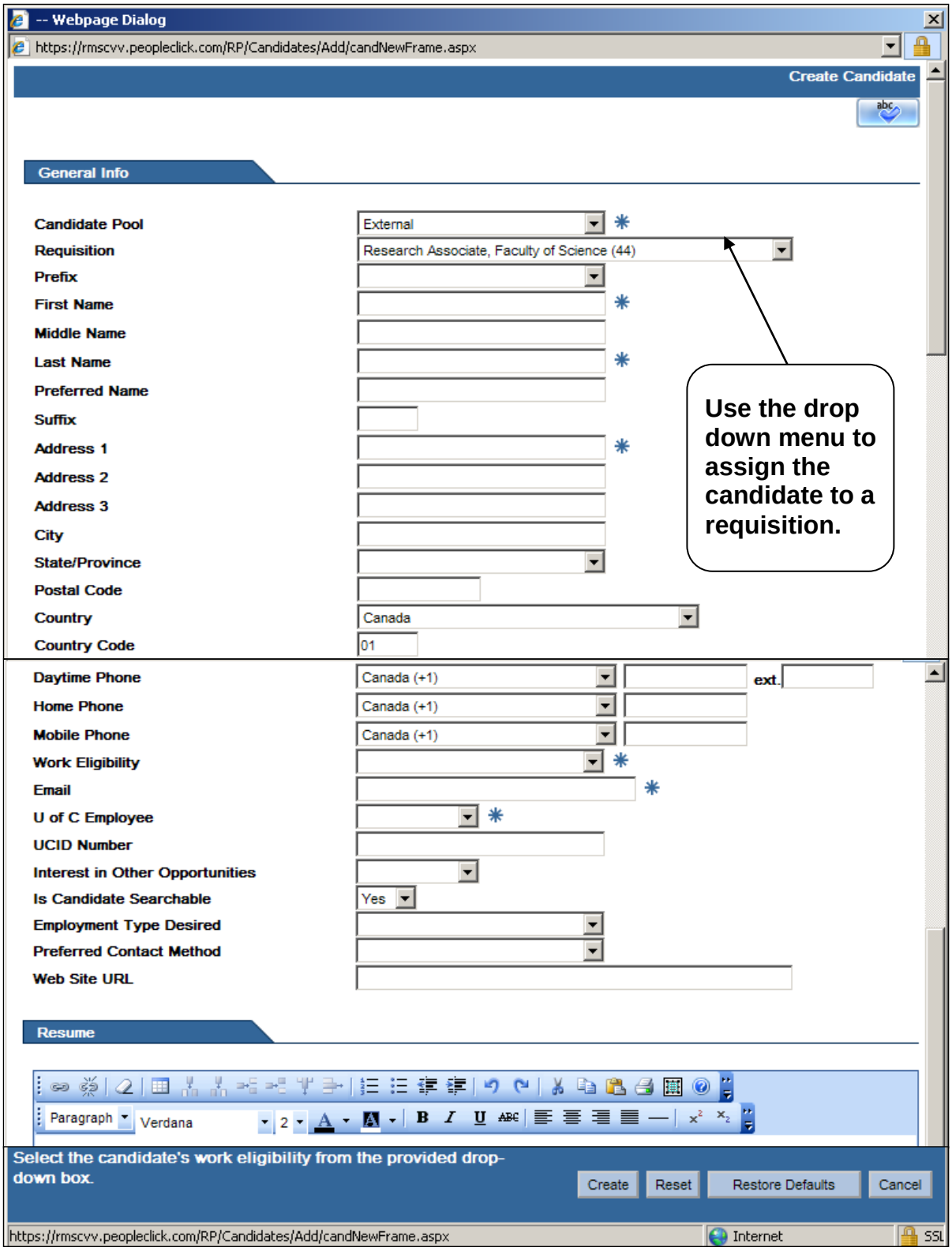
Most candidates enter into Peopleclick by completing an online application in the Candidate Portal. However, occasionally you may need to manually enter a candidate into the system if the requisition was not posted (i.e. Temporary Short Term positions)

1. Click the **Create Candidate** icon



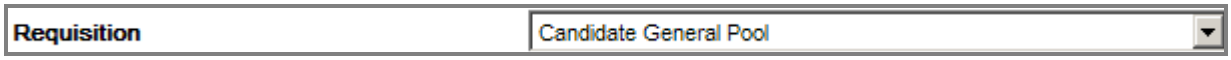
CREATE A CANDIDATE RECORD (CONTINUED)

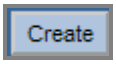
2. Referring to the candidate's resume or CV, enter the candidate's data. The fields that are required are noted with an asterisk (✱)



CREATE A CANDIDATE RECORD (CONTINUED)

3. Be sure to select the appropriate requisition that the candidate should appear in by selecting a requisition from the **Requisition** field



4. After you have entered all applicable candidate information, click 

to save the candidate.

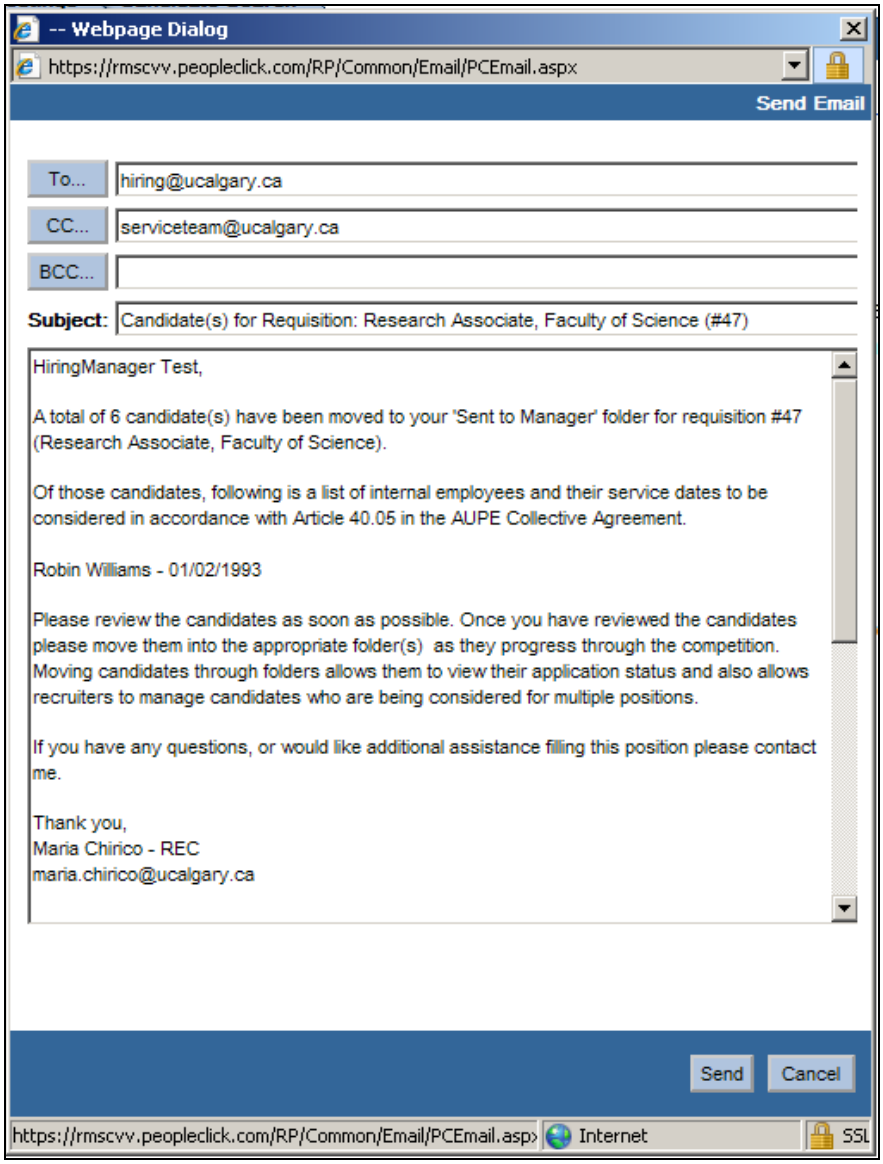
5. The new candidate will appear in the Recruiter's **Inbox** folder of the appropriate requisition.

   Please notify your Recruiter (hrhire@ucalgary.ca) if you have created a candidate. Your Recruiter will then move the candidate so that he/she appears in the **Sent to Manager** folder of the requisition you selected.

PEOPLECLICK WORKFLOW

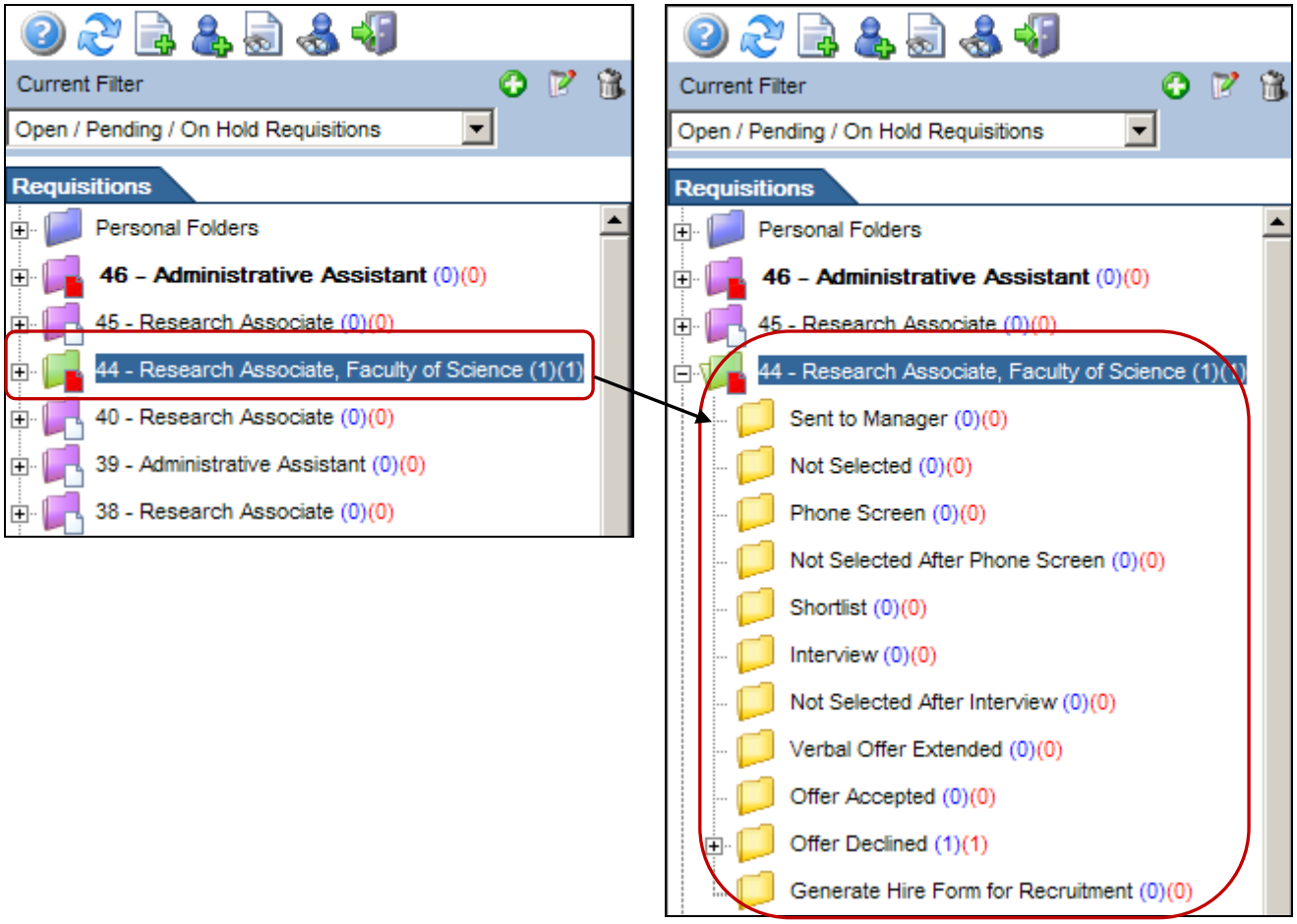
MANAGING THE WORKFLOW ~ MOVING CANDIDATES THROUGH THE WORKFLOW

Once all approvals have been obtained and the position has been posted and closed, the following email will be sent to the Hiring Lead and HR Service Team to notify them of the total number of candidates that have applied for the position and highlighting internal candidates with their service date (as per Article 40.05 in the AUPE Collective Agreement).


-- Webpage Dialog
https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.aspx
Send Email
To...
hiring@ucalgary.ca
CC...
serviceteam@ucalgary.ca
BCC...
Subject:
Candidate(s) for Requisition: Research Associate, Faculty of Science (#47)
HiringManager Test,
A total of 6 candidate(s) have been moved to your 'Sent to Manager' folder for requisition #47 (Research Associate, Faculty of Science).
Of those candidates, following is a list of internal employees and their service dates to be considered in accordance with Article 40.05 in the AUPE Collective Agreement.
Robin Williams - 01/02/1993
Please review the candidates as soon as possible. Once you have reviewed the candidates please move them into the appropriate folder(s) as they progress through the competition. Moving candidates through folders allows them to view their application status and also allows recruiters to manage candidates who are being considered for multiple positions.
If you have any questions, or would like additional assistance filling this position please contact me.
Thank you,
Maria Chirico - REC
maria.chirico@ucalgary.ca
Send
Cancel
https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.asp
Internet
SSL

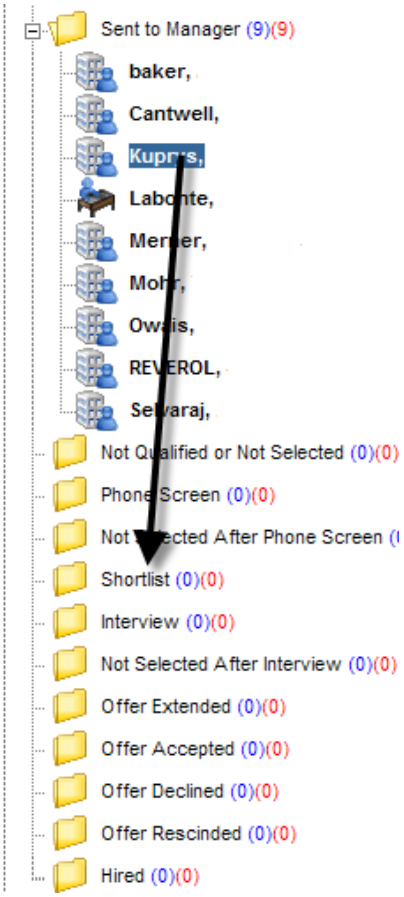
MANAGING THE WORKFLOW ~ MOVING CANDIDATES THROUGH THE WORKFLOW (CONTINUED)

As candidates progress through the hiring process, you will move them through the corresponding folders in the Workflow frame.

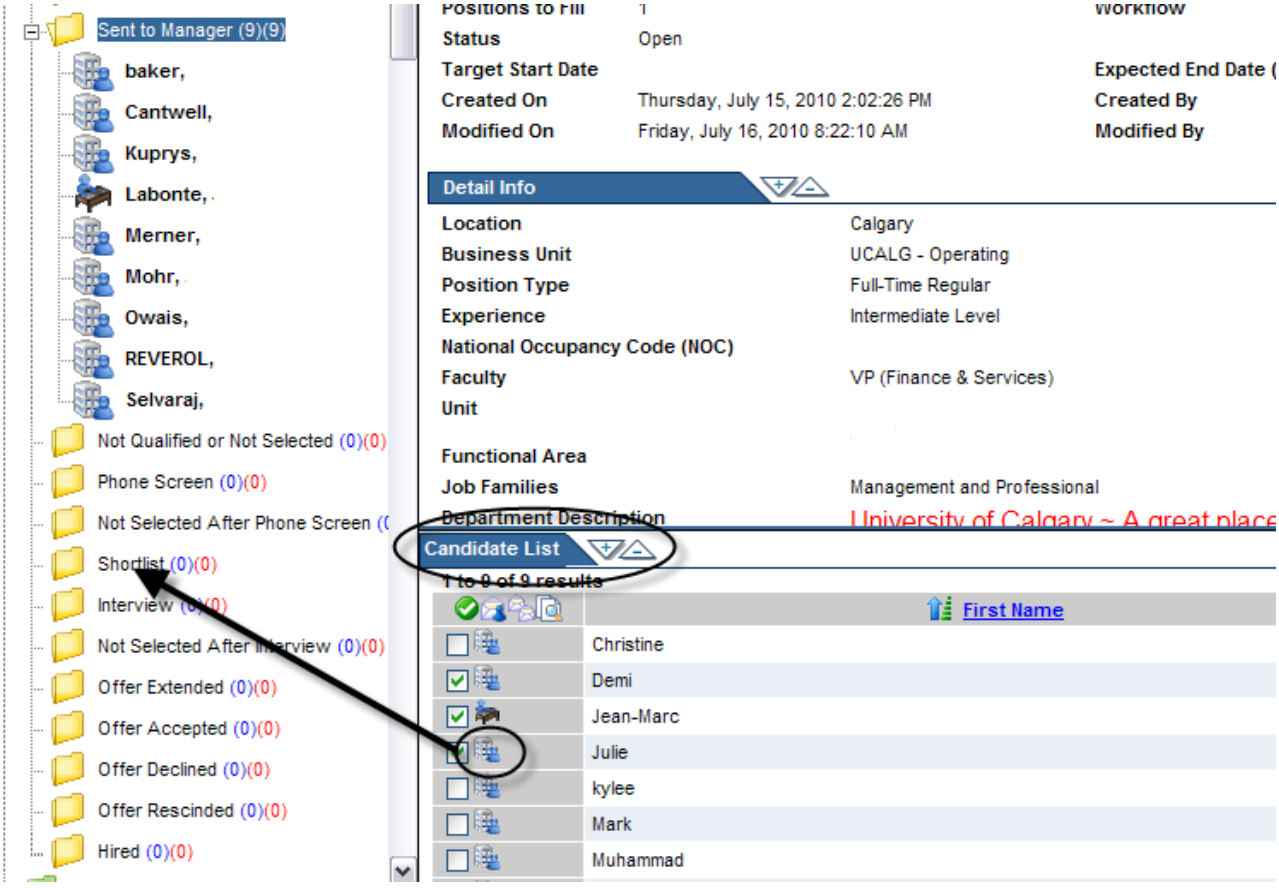

Current Filter
Open / Pending / On Hold Requisitions
Requisitions
Personal Folders
46 – Administrative Assistant (0)(0)
45 - Research Associate (0)(0)
44 - Research Associate, Faculty of Science (1)(1)
40 - Research Associate (0)(0)
39 - Administrative Assistant (0)(0)
38 - Research Associate (0)(0)
Current Filter
Open / Pending / On Hold Requisitions
Requisitions
Personal Folders
46 – Administrative Assistant (0)(0)
45 - Research Associate (0)(0)
44 - Research Associate, Faculty of Science (1)(1)
Sent to Manager (0)(0)
Not Selected (0)(0)
Phone Screen (0)(0)
Not Selected After Phone Screen (0)(0)
Shortlist (0)(0)
Interview (0)(0)
Not Selected After Interview (0)(0)
Verbal Offer Extended (0)(0)
Offer Accepted (0)(0)
Offer Declined (1)(1)
Generate Hire Form for Recruitment (0)(0)

To display the workflow folders within a requisition, click the **+** sign next to the requisition name. Each workflow folder represents a step in the hiring workflow.

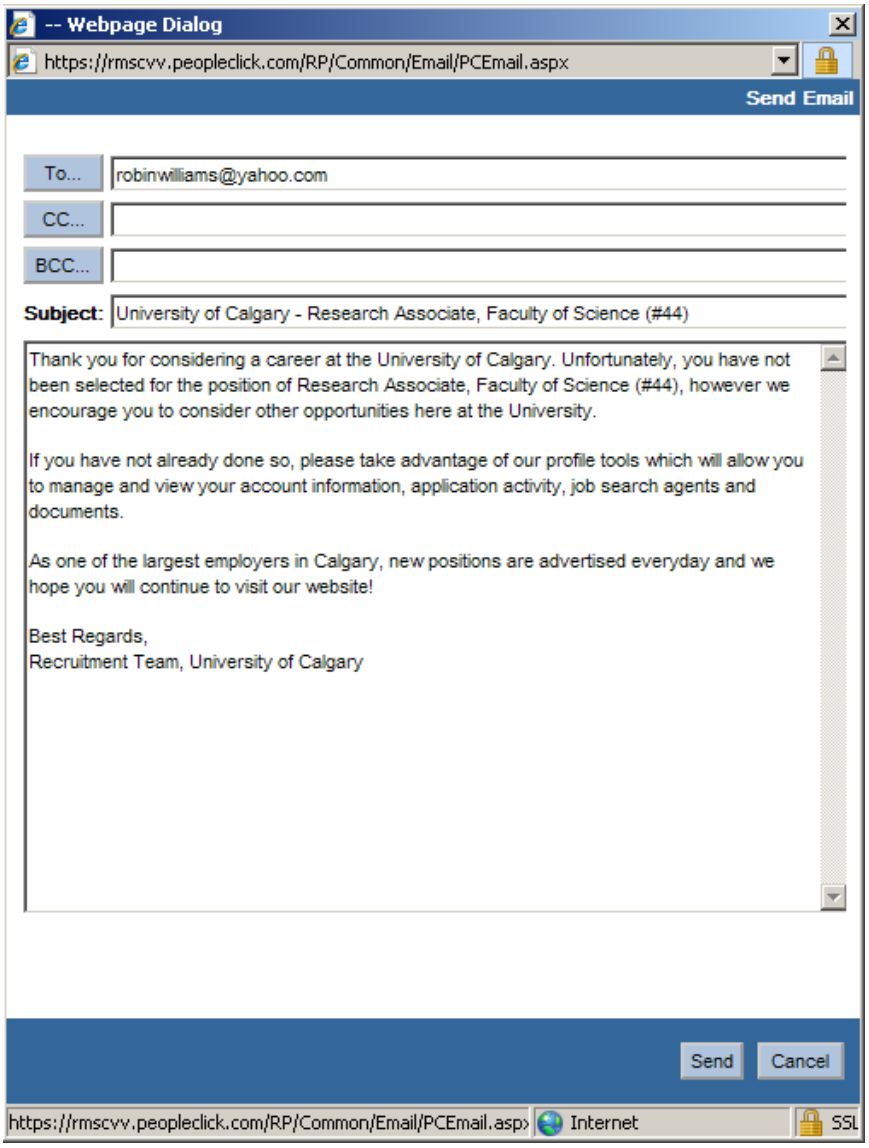
How to move candidates within the Workflow folders: Option 1	
Step	**Description**
1	Click on the name of the candidate to view their resume and candidate information
2	Click on the name of the candidate and holding down the left mouse button, drag the candidate down to the folder where you want to move the candidate
3	The candidate's name is displayed under the new folder name

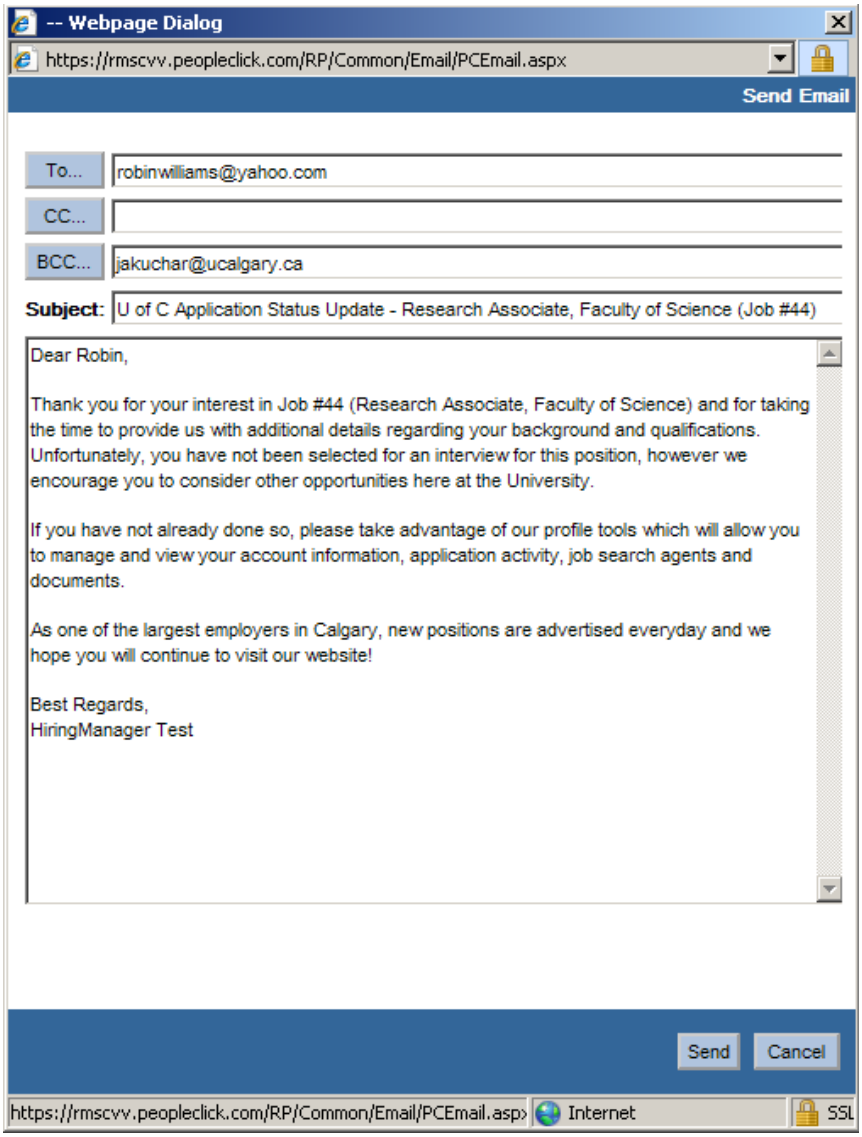


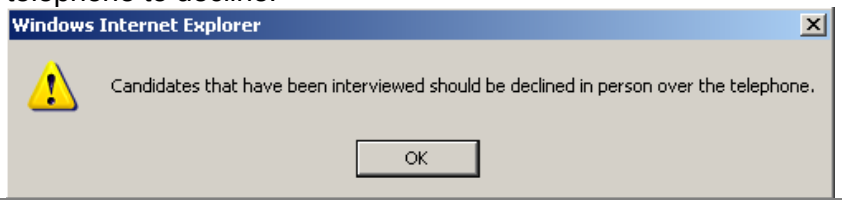
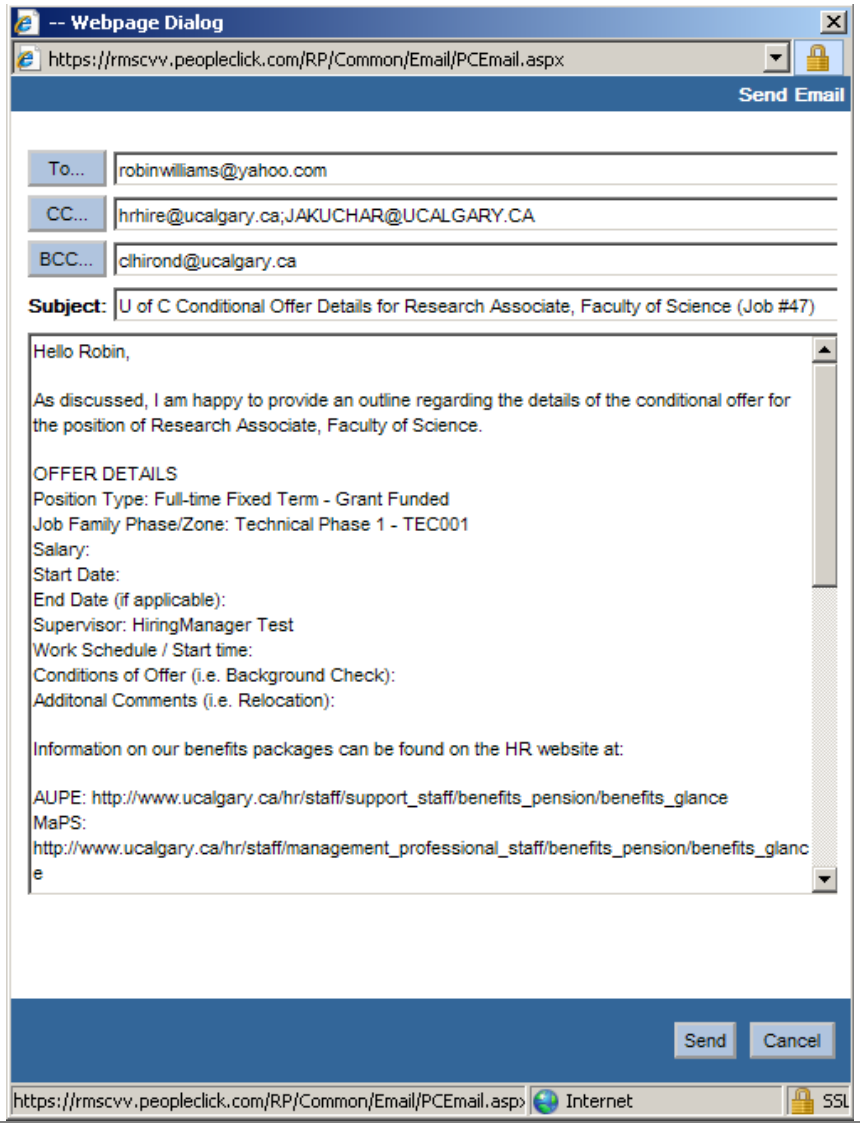
How to move candidates within the Workflow folders: Option 2	
Step	**Description**
1	Click the Workflow folder title that you want to move candidates from and display the candidate list
2	In the Candidate List, put a check mark next to the candidate(s) you want to move
3	Click the or icon next to the first candidate you selected, and drag the candidates into the desired workflow folder

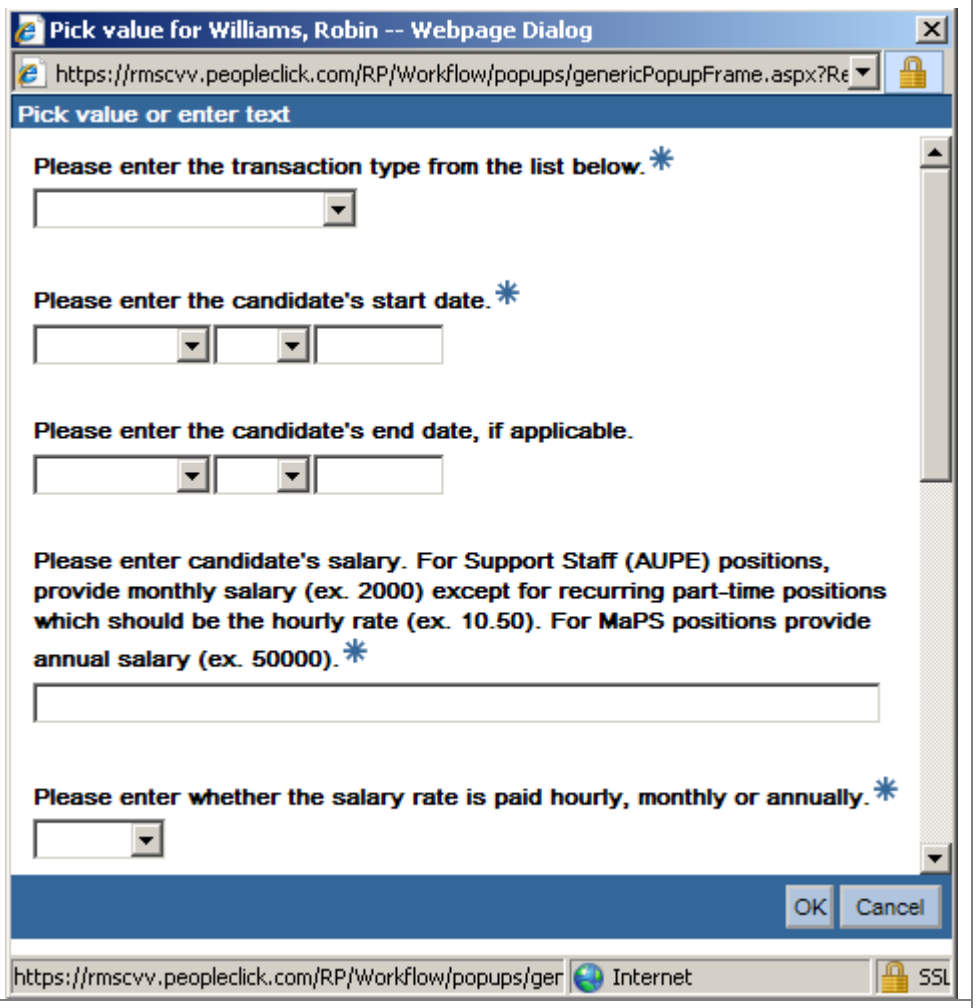


WORKFLOW FOLDERS AND TRIGGERS

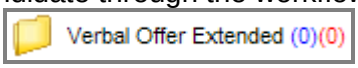
Workflow Folder	Folder Description
Sent to Manager	Candidates who have met minimum requirements and have been sent to the requisition contacts for review
Not Selected	Candidates who have not been shortlisted for the position ***Note:*** An **email trigger** will be generated containing a generic and editable decline email to the candidate(s). This email is sent from hrhire@ucalgary.ca 
Phone Screen	Candidates who have been selected for a phone screen

Not Selected After Phone Screen	Candidates who were not selected after phone screen ***Note:*** An **email trigger** will be generated containing an editable decline email to the candidate. 
Shortlist	Candidates who have been shortlisted
Interview	Candidates who have been selected for an interview

Not Selected After Interview	Candidates who have not been selected after interview ***Note:*** A **message trigger** will appear with a reminder that candidates who have been brought in for an interview should be contacted via telephone to decline. 
Verbal Offer Extended	Successful candidate who has been extended a verbal offer. ***Note:*** An **email trigger** will be generated to outline conditional offer details. This should be sent to the candidate and is meant to be a confirmation of the verbal / conditional offer. 

Offer Accepted	Verbal offer accepted ***Note:*** A **trigger** will be generated to collect final offer details. 
Offer Declined	Verbal offer declined
Generate Hire Form for Recruitment	Once offer has been accepted, move candidate to the **Generate Hire Form for Recruitment** folder. ***Note:*** A **document trigger** will generate the **Hire Form** which will be populated with both job and candidate details.

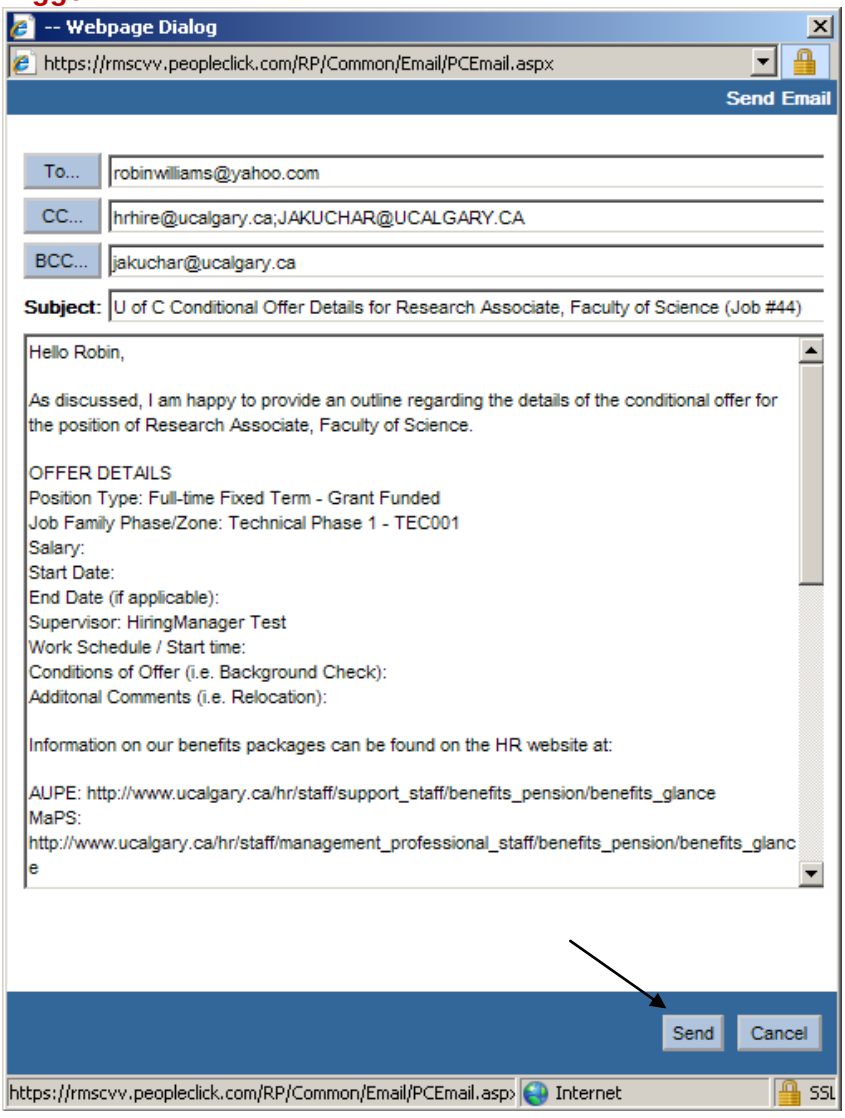
WORKFLOW STEPS IN THE OFFER PROCESS

1. Once the successful candidate has been determined, the candidate should be extended a verbal offer, and followed up by moving the candidate through the workflow to the **Verbal Offer Extended** folder in the Workflow frame. 

   An email trigger will appear **(Trigger 1)** containing offer details. This email should be sent to the successful candidate and copied to the HR Team and Hiring Managers as listed in Peopleclick (requisition contacts should automatically populate).

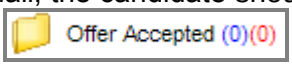
   Most information will automatically populate, however **Salary, Start Date, End Date (if applicable), Work Schedule / Start time, Conditions of Offer (if applicable)** and any **Additional Comments** will need to be entered.

   Trigger 1:



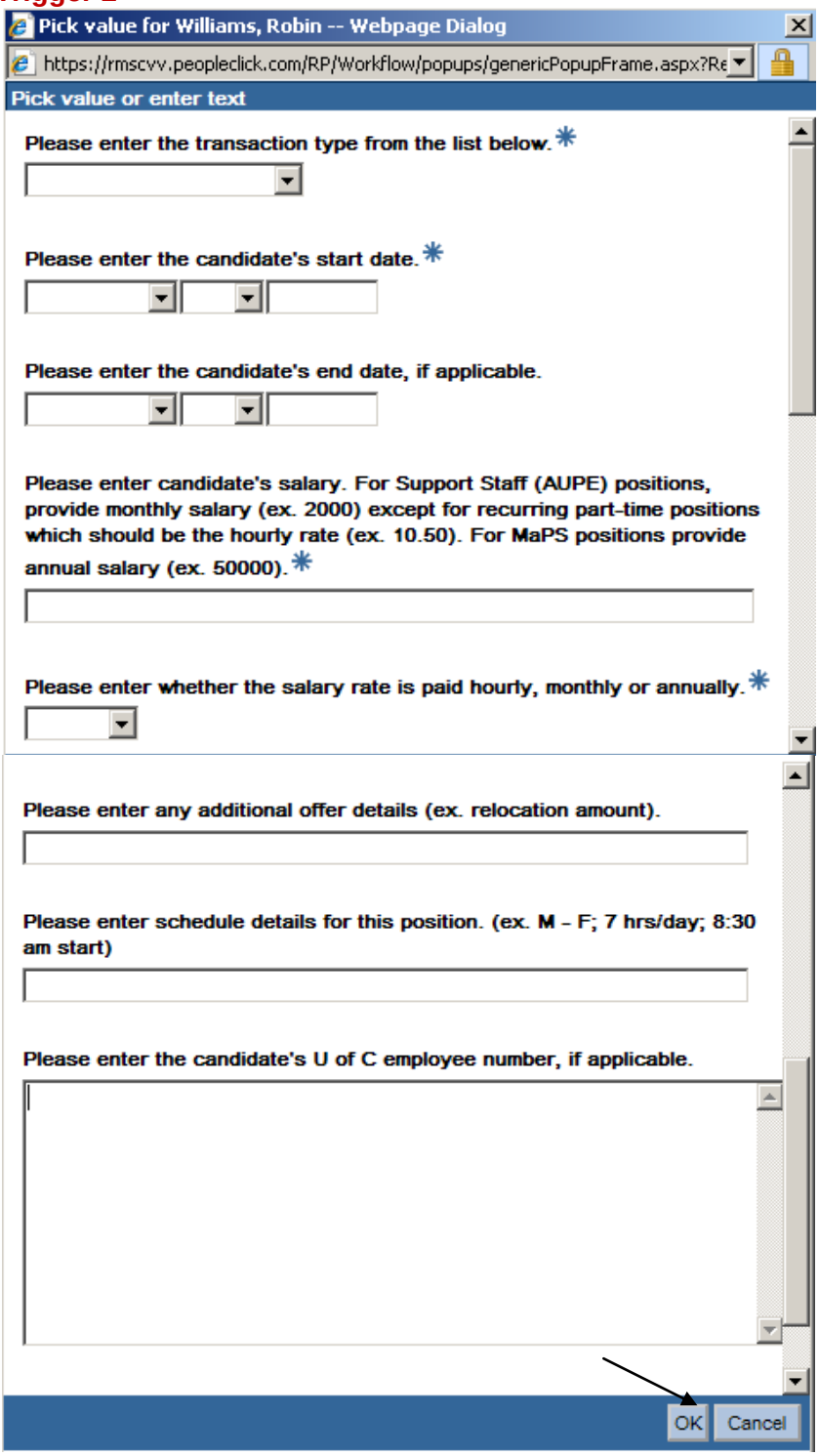
   Once offer details are complete, click

.

2. Once the successful candidate has agreed to the terms of the verbal offer by verbally accepting or by replying to the 'Conditional Offer Details' email, the candidate should be moved to the **Offer Accepted** folder in the Workflow frame. 

The following trigger will appear to collect final offer details **(Trigger 2)**.

Trigger 2


Pick value for Williams, Robin -- Webpage Dialog
https://rmscvv.peopleclick.com/RP/Workflow/popups/genericPopupFrame.aspx?Re
Pick value or enter text
Please enter the transaction type from the list below.*
Please enter the candidate's start date.*
Please enter the candidate's end date, if applicable.
Please enter candidate's salary. For Support Staff (AUPE) positions, provide monthly salary (ex. 2000) except for recurring part-time positions which should be the hourly rate (ex. 10.50). For MaPS positions provide annual salary (ex. 50000).*
Please enter whether the salary rate is paid hourly, monthly or annually.*
Please enter any additional offer details (ex. relocation amount).
Please enter schedule details for this position. (ex. M – F; 7 hrs/day; 8:30 am start)
Please enter the candidate's U of C employee number, if applicable.
OK
Cancel

3. Enter the following candidate offer details into the **Offer Accepted** trigger:

Trigger Field	Description
Transaction Type	Please enter the transaction type from the drop down list.
Candidate's Start Date	Please enter the candidate's start date.
Candidate's End Date	Please enter the candidate's end date, if applicable (ie. Temporary, Limited Term and Fixed Term positions)
Candidate's Salary (do not include $)	Please enter candidate's salary. For Support Staff (AUPE) positions, provide the monthly salary (ex. 2000) except for recurring part-time positions which should be the hourly rate (ex. 10.50). For MaPS positions provide the annual salary (ex. 50000).
Salary Schedule	Please enter whether the salary rate is paid hourly, monthly or annually.
Additional Offer Details	Please enter any additional offer details (ex. Relocation amount), notes for offer letter, etc.
Schedule Details	Please enter schedule details for this position. (ex. M – F; 7 hrs/day; 8:30 am start) ***Note:*** Recurring Part Time positions do not require a schedule
UCID	Please enter the candidate's UCID (employee id #) if applicable.
Employee Record	Please enter the employee record number to which this position applies, if applicable.

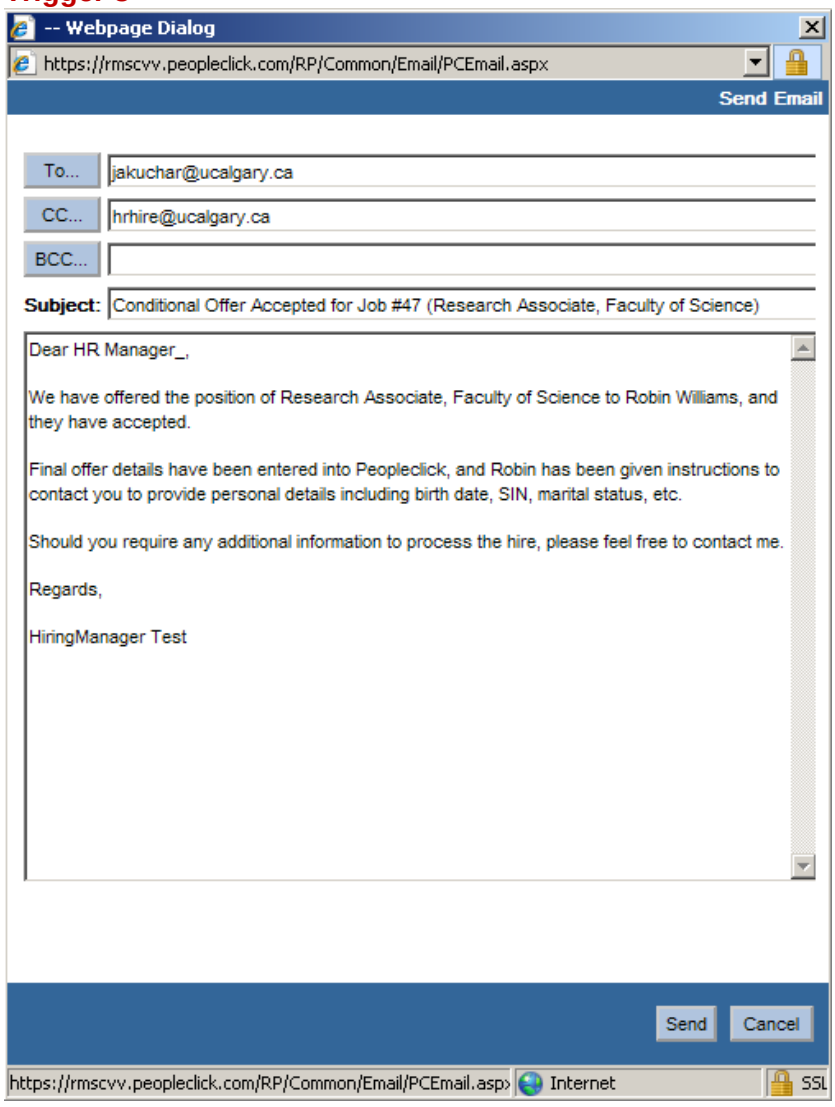
Once offer details are complete, click

.

WORKFLOW STEPS IN THE OFFER PROCESS (CONTINUED)

An email trigger will appear **(Trigger 3)** containing offer details. This email is meant to be sent by the Hiring Lead to the primary recruiter (HR Service Team member) to confirm that the candidate has accepted the offer and inform them the candidate is ready for processing (requisition contacts should automatically populate).

Trigger 3

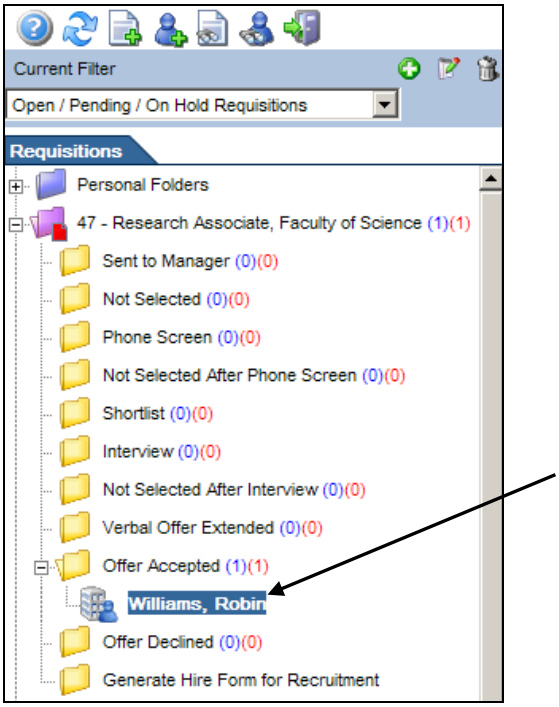

-- Webpage Dialog
https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.aspx
Send Email
To...
jakuchar@ucalgary.ca
CC...
hrhire@ucalgary.ca
BCC...
Subject:
Conditional Offer Accepted for Job #47 (Research Associate, Faculty of Science)
Dear HR Manager_,
We have offered the position of Research Associate, Faculty of Science to Robin Williams, and they have accepted.
Final offer details have been entered into Peopleclick, and Robin has been given instructions to contact you to provide personal details including birth date, SIN, marital status, etc.
Should you require any additional information to process the hire, please feel free to contact me.
Regards,
HiringManager Test
Send
Cancel
https://rmscvv.peopleclick.com/RP/Common/Email/PCEmail.asp
Internet
SSL

How to Edit Offer Information

If you need to make any changes to the Offer Accepted information or Candidate Information after clicking OK on the Offer Accepted trigger, please navigate to the following pages in Peopleclick.

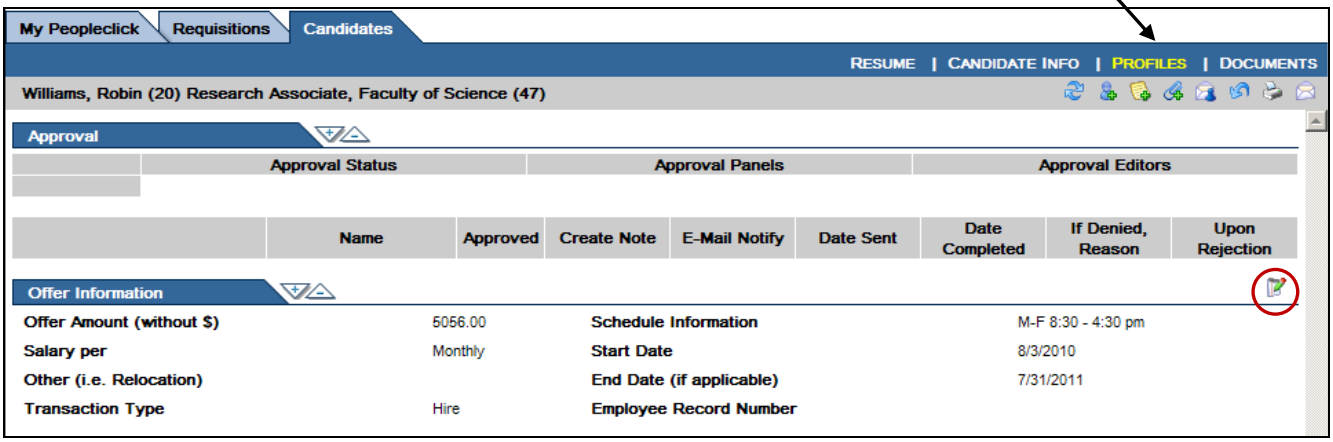
Changes to Offer Information

a) In the Workflow frame, under the **Offer Accepted** folder, click on the successful candidate's name

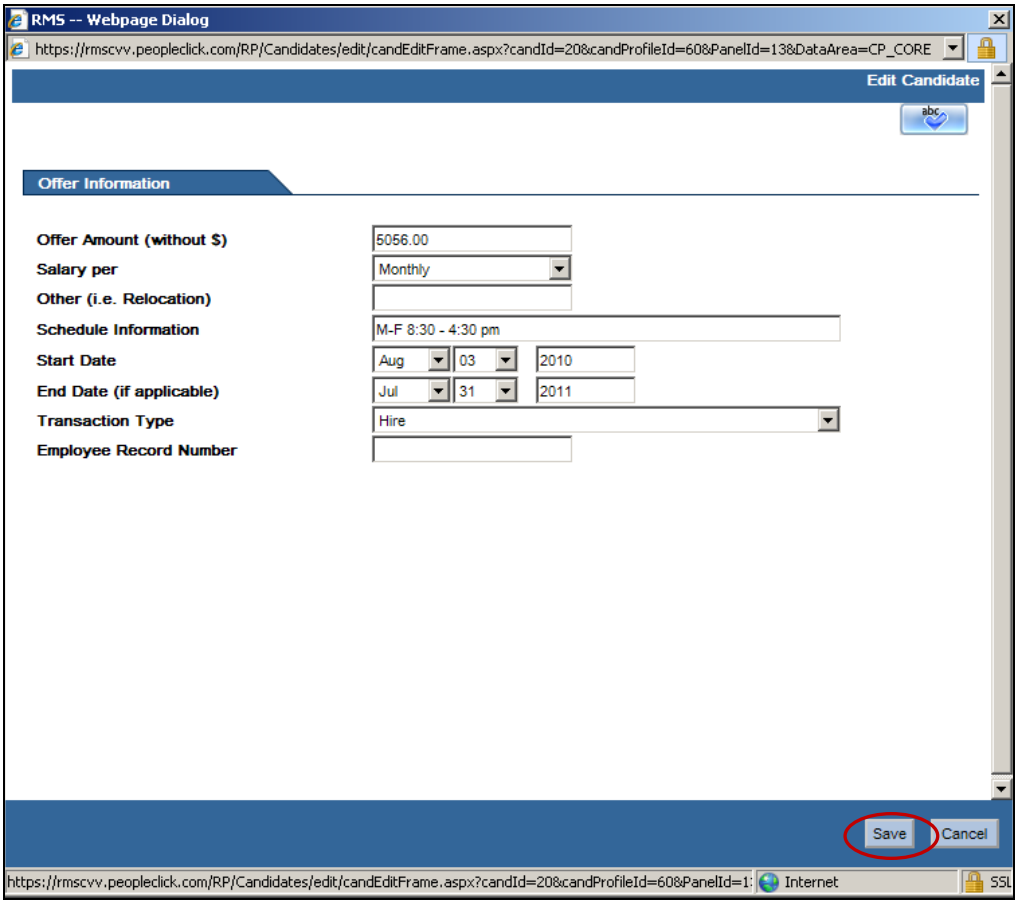


b) In the Detail frame, click on the **Profiles** link to display **Offer Information**

c) To make changes to the Offer Information, click the edit ( ) icon



d) Edit the applicable offer details and click Save

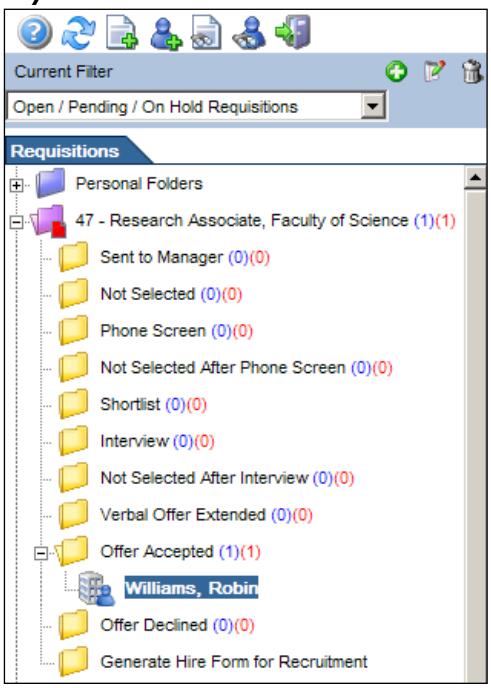


IMPORTANT NOTE:

Any change made to a candidate's offer information details requires that a revised Hire form be generated and sent to hrhire@ucalgary.ca.

Changes to Candidate Information

a) In the Workflow frame under the **Offer Accepted** folder, click on the candidate's name

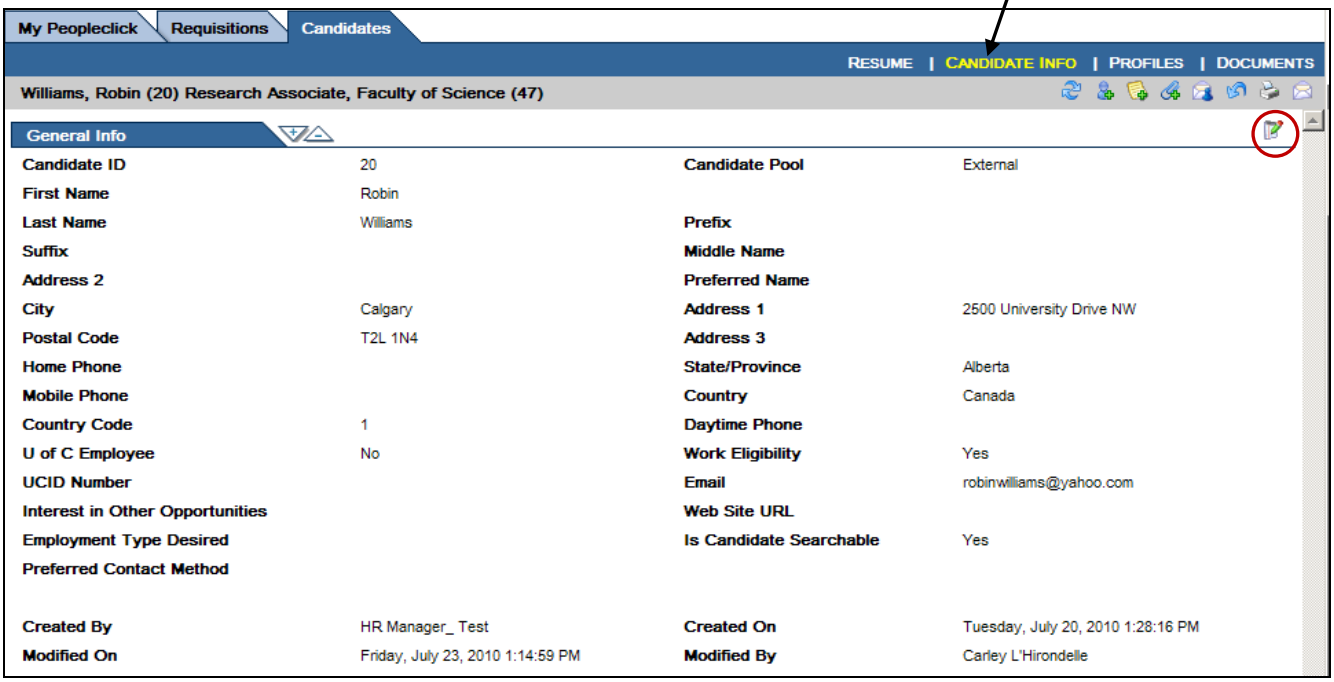


b) In the Detail frame, click on the **Candidate Info** link to display general candidate info

Under the **Candidate Info** section you may edit any of the following which will automatically populate into the Hire Form:

- First Name
- Last Name
- Address Information
- Contact Information
- Email
- UCID #

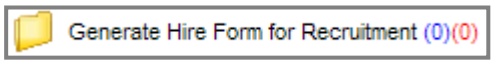
c) To make changes to the Candidate Info, click the edit ( ) icon



d) Edit the applicable Candidate Info and click Save

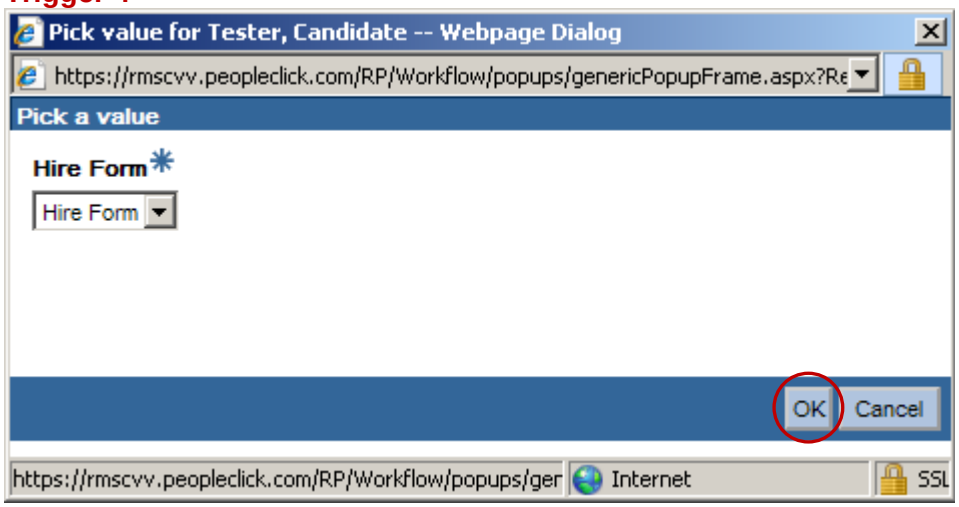
4. Generate Hire Form

Once you are sure both the *Offer Information* and the *Candidate Information* are correct and complete, you are ready to generate the hire form. To complete the hire form, move the candidate to the **Generate Hire Form for Recruitment** folder in the Workflow frame.



A trigger will appear **(Trigger 4)**.

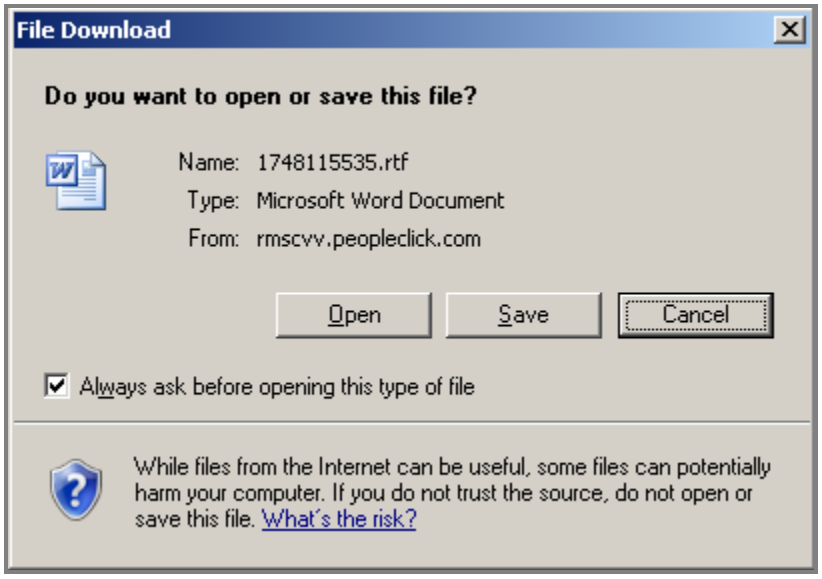
Trigger 4



Click

and hold the **Control Key (Ctrl)** on your keyboard

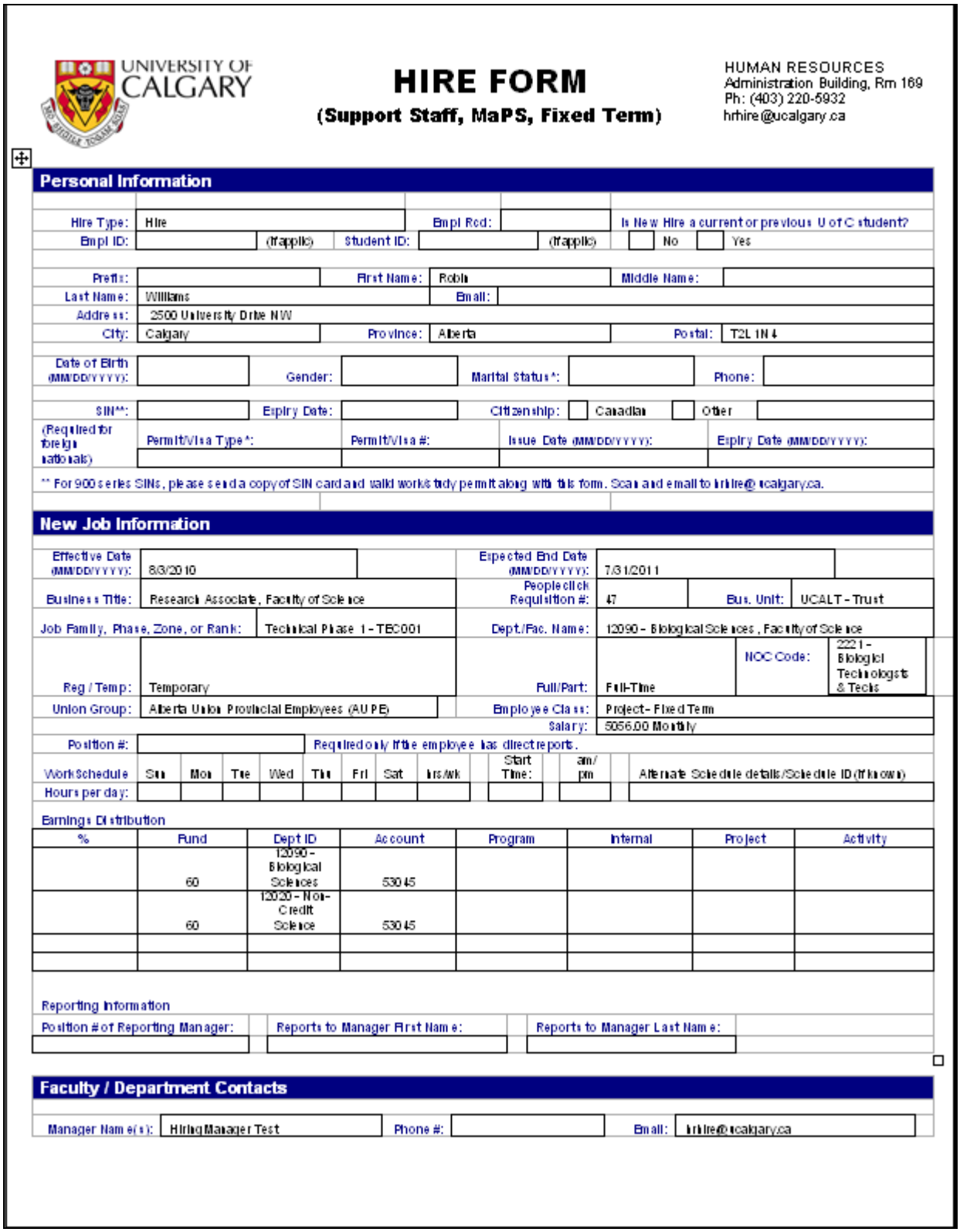
The following **File Download** prompt will appear on your screen. Select **Open**


File Download
Do you want to open or save this file?
Name: 1748115535.rtf
Type: Microsoft Word Document
From: rmscvv.peopleclick.com
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

WORKFLOW STEPS IN THE OFFER PROCESS (CONTINUED)

The **Hire Form** will appear on the screen

Hire Form – page 1



UNIVERSITY OF CALGARY

HIRE FORM

(Support Staff, MaPS, Fixed Term)

HUMAN RESOURCES
Administration Building, Rm 169
Ph: (403) 220-5932
hrhire@ucalgary.ca

Personal Information

Hire Type:	Hire	Empl Rcd:		Is New Hire a current or previous U of C student?	
Empl ID:	(if applic)	Student ID:	(if applic)	☐ No	☐ Yes
Prefix:		First Name:	Robin	Middle Name:	
Last Name:	Williams	Email:			
Address:	2500 University Drive NW				
City:	Calgary	Province:	Alberta	Postal:	T2L 1N4
Date of Birth (MM/DD/YYYY):		Gender:		Marital Status*:	Phone:
SIN**:		Expiry Date:		Citizenship: ☐ Canadian ☐ Other	
(Required for foreign nationals)	Permit/Visa Type*:	Permit/Visa #:	Issue Date (MM/DD/YYYY):	Expiry Date (MM/DD/YYYY):	

** For 900 series SINs, please send a copy of SIN card and valid work study permit along with this form. Scan and email to hrhire@ucalgary.ca.

New Job Information

Effective Date (MM/DD/YYYY):	8/3/2010	Expected End Date (MM/DD/YYYY):	7/31/2011
Business Title:	Research Associate, Faculty of Science	PeopleClick Requisition #:	47
Bus. Unit:	UCALT - Trust		
Job Family, Phase, Zone, or Rank:	Technical Phase 1 - TEC001	Dept./Fac. Name:	12090 - Biological Sciences, Faculty of Science
Reg / Temp:	Temporary	Full/Part:	Full-Time
NOC Code:	2221 - Biological Technologists & Techs		
Union Group:	Alberta Union Provincial Employees (AUPE)	Employee Class:	Project - Fixed Term
		Salary:	5056.00 Monthly
Position #:		Required only if the employee has direct reports.	

Work Schedule	Sun	Mon	Tue	Wed	Thu	Fri	Sat	hrs/wk	Start Time:	am/pm	Alternate Schedule details/Schedule ID (if known)
Hours per day:											

Earnings Distribution

%	Fund	Dept ID	Account	Program	Internal	Project	Activity
	60	12090 - Biological Sciences	53045				
	60	12020 - Non-Credit Science	53045				

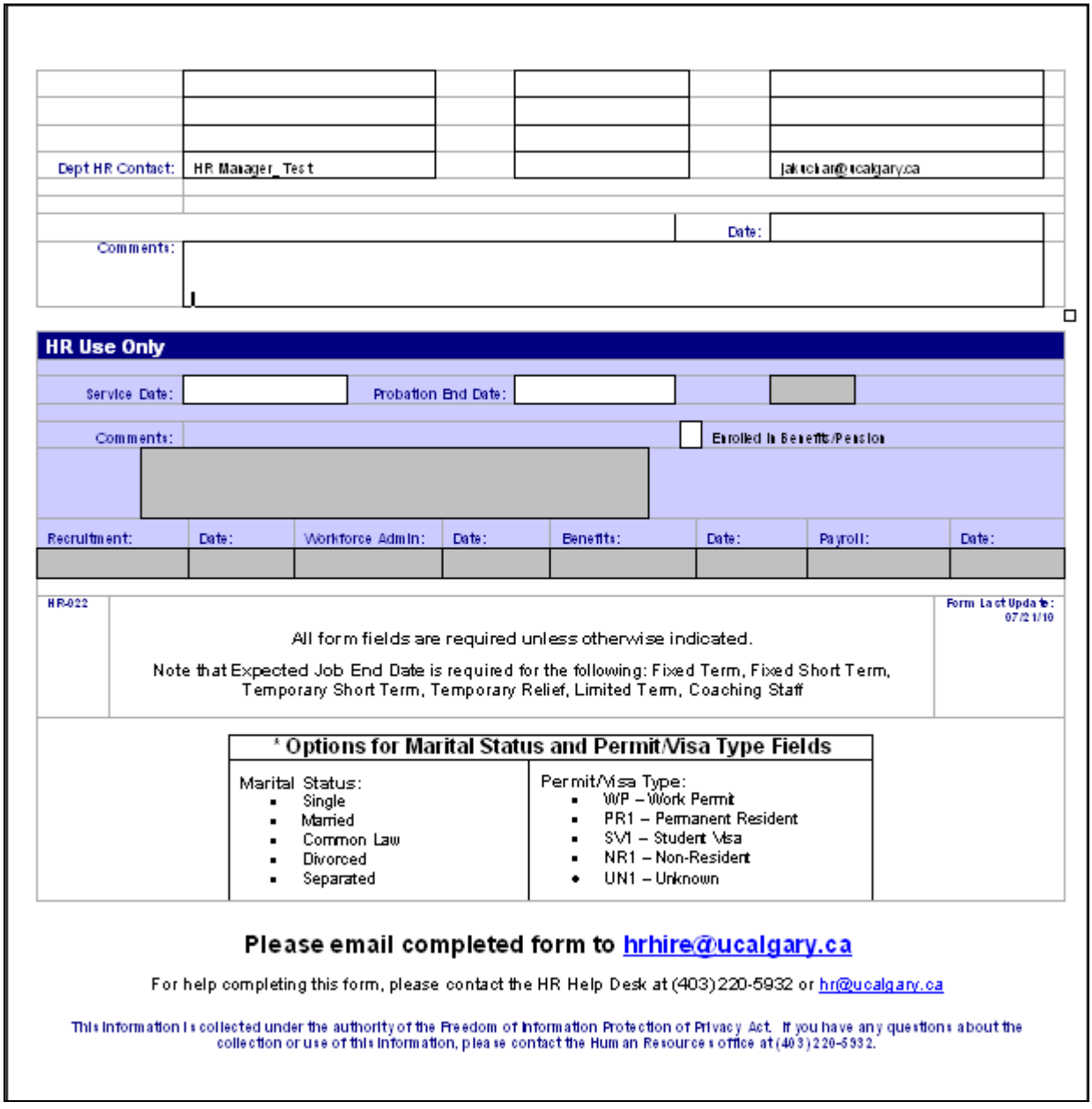
Reporting Information

Position # of Reporting Manager:	Reports to Manager First Name:	Reports to Manager Last Name:

Faculty / Department Contacts

Manager Name(s):	Hiring Manager Test	Phone #:		Email:	hrhire@ucalgary.ca

Hire Form continued – page 2



Dept HR Contact:	HR Manager_Test		jakichlar@ucalgary.ca
		Date:	
Comments:			

HR Use Only

Service Date:		Probation End Date:					
Comments:				Enrolled in Benefits/Pension			
Recruitment:	Date:	Workforce Admin:	Date:	Benefits:	Date:	Payroll:	Date:

HR-022

Form Last Update: 07/21/10

All form fields are required unless otherwise indicated.

Note that Expected Job End Date is required for the following: Fixed Term, Fixed Short Term, Temporary Short Term, Temporary Relief, Limited Term, Coaching Staff

*** Options for Marital Status and Permit/Visa Type Fields**

Marital Status:	Permit/Visa Type:
▪ Single	▪ WP – Work Permit
▪ Married	▪ PR1 – Permanent Resident
▪ Common Law	▪ SV1 – Student Visa
▪ Divorced	▪ NR1 – Non-Resident
▪ Separated	▪ UN1 – Unknown

Please email completed form to hrhire@ucalgary.ca

For help completing this form, please contact the HR Help Desk at (403) 220-5932 or hr@ucalgary.ca

This information is collected under the authority of the Freedom of Information Protection of Privacy Act. If you have any questions about the collection or use of this information, please contact the Human Resources office at (403) 220-5932.

Several fields will need to be completed prior to sending the form to Recruitment for processing. Please review pre-populated information and enter the following required fields on the hire form for the successful candidate:

Personal Information:

- Student ID (if applicable)
- Is New Hire a current or previous U of C employee?
- Date of Birth
- Gender
- Marital Status
- Social Insurance Number (SIN)
- SIN Expiry Date (if applicable)
- Citizenship
- Permit/Visa Information (required for foreign nationals)

New Job Information:

- Schedule Details
- Reporting Manager name

Faculty / Department Contacts:

- Comments (if applicable)

a) Once the Hire form is complete, save it and email it to hrhire@ucalgary.ca

ICON GLOSSARY

Global Toolbar Icons

These icons appear in the top left corner of the screen

View the Recruiting Portal online help

Refresh the display of Requisitions and Candidates in the Workflow Tree

Requisition Quick Find

Candidate Quick Find

Log out of the Recruiting Portal

Requisition Icons

These icons appear next to the requisition in the Workflow Tree

(green)	Open Requisition
(green with blue thumb tack)	Open Requisition that is posted on the U of C Careers website
(purple)	Requisition pending approval
(yellow)	Closed Requisition
(blue)	Requisition that has been filled
(orange)	Requisition that has been cancelled
(red)	Requisition that has been rejected or sent back for corrections

Requisition Toolbar Icons

These icons appear in the top right corner of the Requisition tab

Refresh the information shown for the current requisition

Display all the candidates in the requisition in the Candidate List frame

Add a note to the current requisition

Attach a document to the current requisition

Print the current requisition

Right-Click Requisition Icons

These icons appear when you right click a requisition in the Workflow Tree

Display the number of candidates in each workflow folder

Display all the candidates in the requisitions in the Candidate List

Quickly find a requisition

Collapse the Workflow Tree

ICON GLOSSARY (CONTINUED)

Right-Click Workflow Folder Icons

These icons appear when you right click a Workflow folder in the Workflow Tree

Quickly find a requisition

Collapse the Workflow Tree

Candidate Indicators

These are the icons that appear next to a candidate's name in the Workflow Tree and the Candidate List

External Candidate

Internal Candidate

Referred Candidate

Candidate Toolbar Icons

These icons appear in the top right corner of the Candidates tab

Refresh the information shown for the current candidate

Add a note to the current candidate

Attach a document to the current candidate

Send an email message to the current candidate

Undo the last candidate move

Print the current candidate's information

Forward the current candidate's resume

Right-Click Candidate Icons

These icons appear when you right click a candidate in the Workflow Tree

Collapse the Workflow Tree

Send an email message to the current candidate

Undo the last candidate move